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**“Take the ‘work’ out
of working with an investment firm.”**

**“Get all your questions
answered—even the ones
you were afraid to ask.”**

**“Invest
on your terms,
not ours.”**



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**“We listen first,
talk second.”**

—Albina,
Schwab
investment
professional

You recently requested information about Schwab—and we hope that means you are considering working with us. To help you decide, a few Schwab investment professionals, starting with me, would like to give you a better sense of what makes us a good choice.

If you were to ask me what it’s like to be a Schwab client, I’d say it depends. We let our clients decide what kind of relationship works best for them. Whether you’d prefer to manage your portfolio or have us take the reins, as a client, you’ll always get the personalized investment guidance you’re looking for.

“We’re there when and where you need us.”

- Take the hassle out of opening an account, transferring assets, and filling out paperwork by using our New Client Concierge.
- Contact us by phone, online, or in person.
- Get answers to your specific investment questions—from retirement to rolling over your 401(k). Our investment professionals can help you access the specialists you need.

Take the next step with us.



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Monday through Friday, 8:30 a.m. to 8:45 p.m. EST.

You’ll speak with a knowledgeable investment professional who will listen and answer your questions—not pressure you or give you a hard sell.



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