

# Schwab Financial Concierge™

Professional guidance  
with you at the center.

*charles*  
SCHWAB

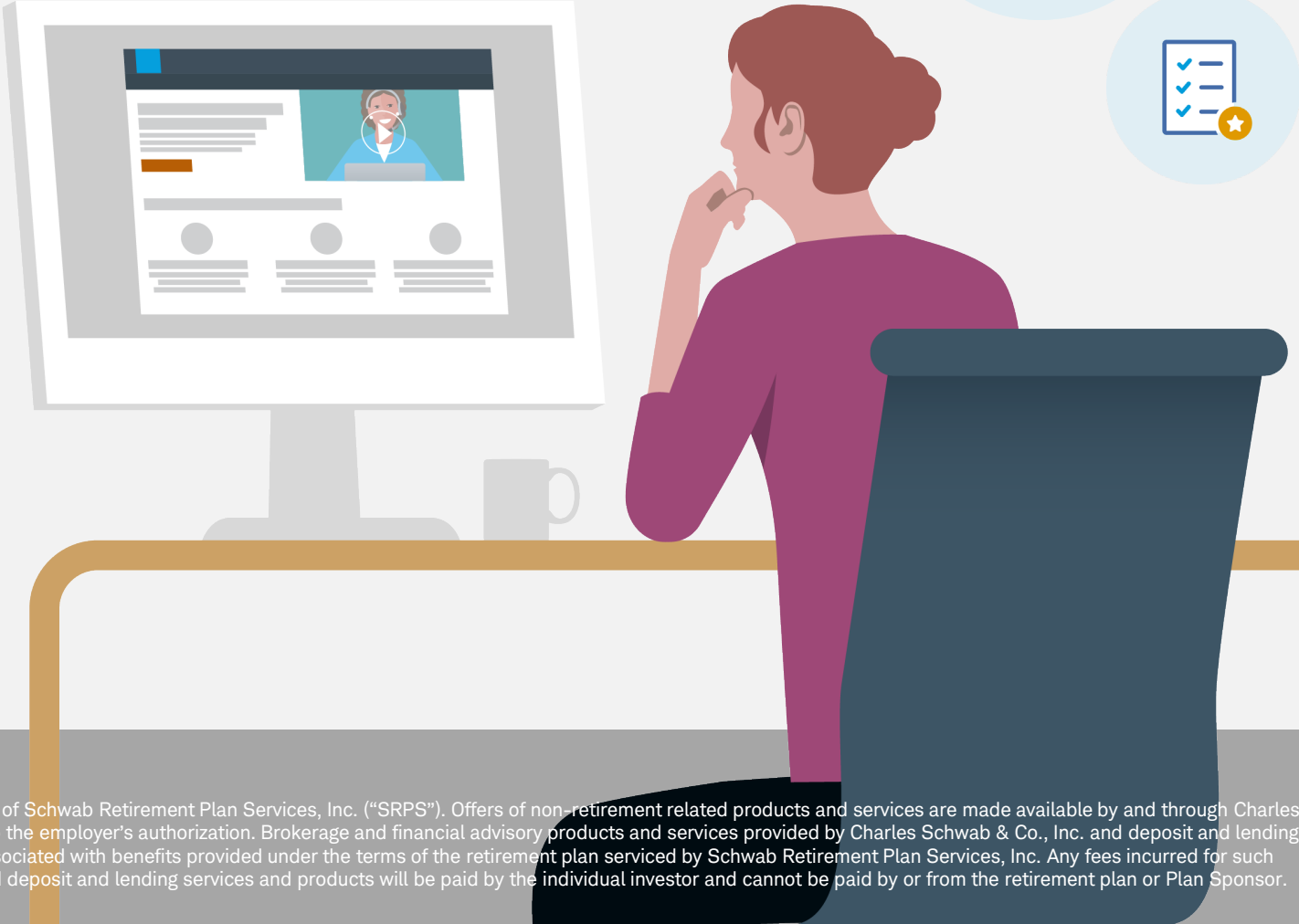
*Own your tomorrow®*

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# Everyone has (financial) needs.



How do I get started with investing?



I want to save for my kid's college education. What are my options?



Is there more I could be doing to save for retirement?



What if I don't know my financial goals right now?



I want to retire soon. What steps should I be taking?



Can I get a second opinion on my investment strategy?

# Meet some examples:



**Tim**

## **The family man**

Tim wants to save for his kid's college education but isn't sure where to start.



**Maya**

## **The pre-retiree**

Maya is looking to retire in a few years and wants to get her finances organized.



**Cheryl**

## **The eager investor**

Cheryl isn't an expert on savings or investing and wants someone to review her approach.

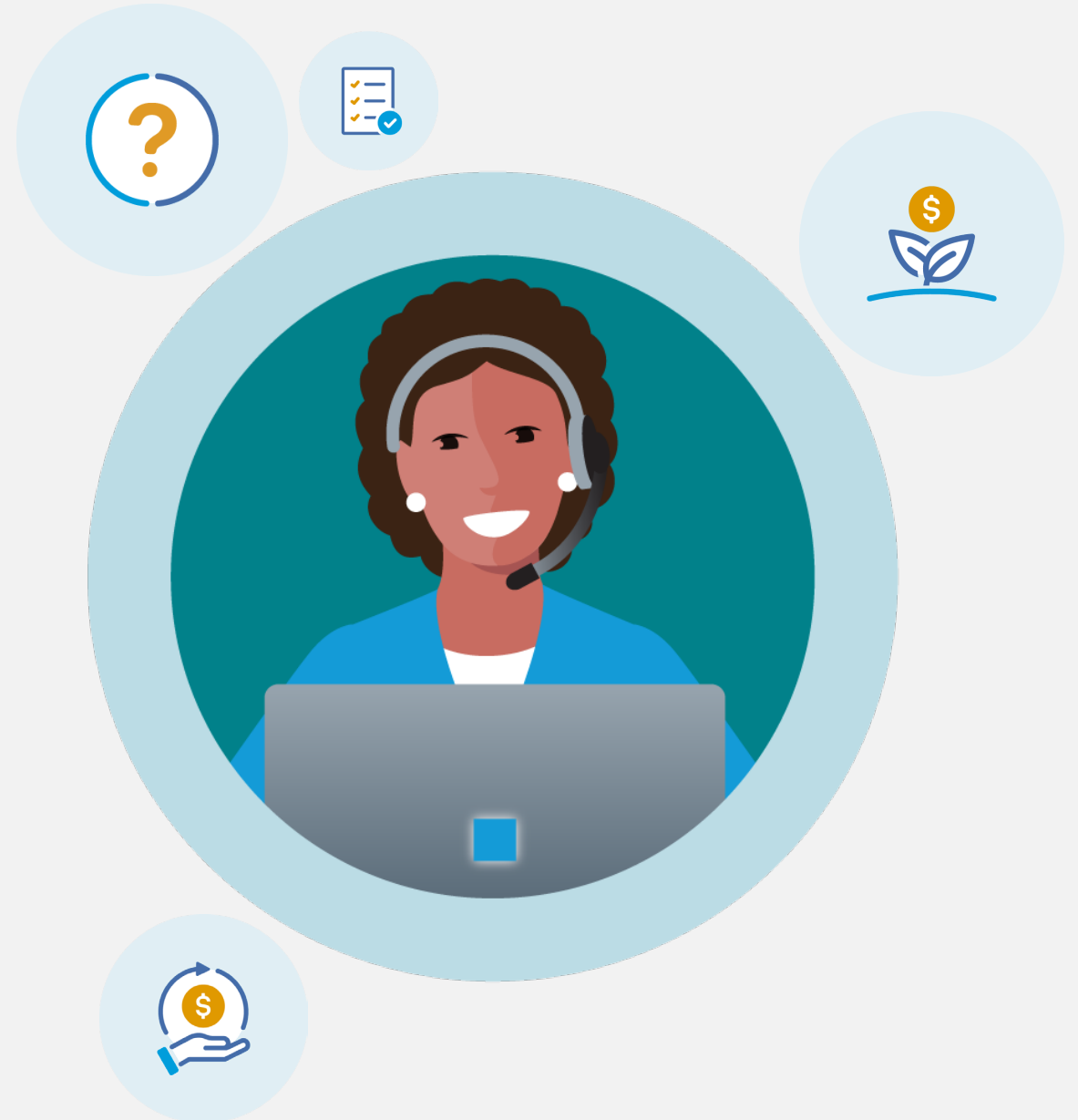
# Schwab Financial Concierge™ can help.

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Getting financial help should be easy—and come with no hidden costs. Thanks to our relationship with Charles Schwab, it is and it does!

**With Schwab Financial Concierge, Tim, Maya, Cheryl, and you can:**

- Ask questions
- Get personal guidance
- Plan next steps
- Call again as needed



# Tim thinks long term.

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When Tim needed help saving for his kid's college education, he called the Schwab Financial Concierge™ team.

## As a result, he:



Figured out how much he could afford to start saving today



Opened a 529 account



Started planning to tackle his other goals



# Maya makes a move.

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With retirement on the horizon, Maya scheduled an appointment with the Schwab Financial Concierge™ team for some insight on what she should be doing to prepare.

## They helped her:



**Consolidate her brokerage accounts**



**Review her financial picture with retirement goals in mind**



# Cheryl gets a second opinion.

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Investing can be a hard topic to master, and Cheryl wanted to make sure her investments were aligned with her goals.

**The Schwab Financial Concierge™ team was able to:**



Review her current strategy and goals



Help her prepare for those rainy days by setting up an emergency savings account





# See how easy help can be.

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Make an appointment.



Call **877-566-2027** between 8:30 a.m. and 8 p.m. ET.



Learn more at [schwab.com/financialconcierge](https://schwab.com/financialconcierge).

# Sources and disclosures

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