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PORTFOLIOS

Institutional Intelligent Portfolios[®]



An innovative platform to help build your business—your way

The emergence of automated investment management is a key consideration for advisors today, fueled by the evolution in technology, new market entrants and increasing client expectations from their own consumer experiences. That's why we developed Institutional Intelligent Portfolios—an automated investment management platform to help you serve clients more efficiently, while delivering a digitally enabled experience clients have come to expect.

Unmatched value to help you grow and serve clients efficiently

- No account service fees, trading commissions or custody fees charged to clients.
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Pricing is based on your firm's total assets custodied with Schwab outside the Institutional Intelligent Portfolios® program.

10 bps.
< \$100M AUM

No fee.
> \$100M AUM



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