



CORPORATION

8:30 a.m. – 8:35 a.m.

**Jeff Edwards, Managing Director, Head of Investor Relations**  
Welcome

8:35 a.m. – 9:40 a.m.

**Walt Bettinger, Co-Chairman of the Board and Chief Executive Officer**  
Long-Term Strategic Overview

**Rick Wurster, President**  
Sustainable Growth Model

**Joe Martinetto, Managing Director, Chief Operating Officer**  
Ameritrade Integration Review  
Combined Q&A Segment

9:40 a.m. – 9:55 a.m.

**Break**

9:55 a.m. – 10:40 a.m.

**Bernie Clark, Managing Director, Head of Advisor Services**  
Advisor Services / Q&A

10:40 a.m. – 11:50 a.m.

**Jonathan Craig, Managing Director, Head of Investor Services and Marketing**  
Retail Investor Update

**James Kostulias, Managing Director, Head of Trading Services**  
Trading Update

**Lisa Hunt, Managing Director, Head of International Services**  
International Services  
Combined Q&A Segment

11:50 a.m. – 12:50 p.m.

**Lunch / Product Demonstrations**

Pledged Asset Line®  
Schwab Investing Themes™  
Schwab Network  
Schwab Personalized Indexing™  
Schwab Trading Powered by Ameritrade™

12:50 p.m. – 1:05 p.m.

**Stacy Hammond, Managing Director, Chief Marketing Officer**  
Client Acquisition and Marketing / Q&A

1:05 p.m. – 1:30 p.m.

**Neesha Hathi, Managing Director, Head of Wealth and Advice Solutions**  
Wealth and Advice Solutions Update / Q&A

1:30 p.m. – 2:00 p.m.

**Peter Crawford, Managing Director, Chief Financial Officer**  
Financial Perspectives / Q&A

**Close**

\*All times CST. Today's presentation will be available for download at the conclusion of the program. To download go to:  
<https://www.aboutschwab.com/financial-reports>

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