



[Schwab @Home with Schwab Retirement Plan Services](#)

Video: Phyllis Klein, Senior Director of Retirement Services, CAPTRUST Financial Advisors and Taylor Garlesky, Managing Director, Consultant Services, Schwab Retirement Plan Services discuss how retirement plan participants can continue to save during uncertain times, and how sponsors may want to think about their plans, especially in terms of advice and managed accounts.

Industry Trends and Updates

[Q4 SDBA Indicators report](#)

Average account balances up 13% year over year, despite pandemic hardships. 2020 started with market lows in Q1, and the volatility associated with the COVID-19 pandemic is ongoing. Despite these factors, Q4 finished with positive news that underscored participant resilience heading into the new year.

[Five trends we expect to drive financial services in 2021](#)

Schwab's Neesha Hathi offers predictions for the year ahead and beyond on the technology and innovation landscape for the industry.

Regulatory and Legislative

[Washington Wise podcast: Will the Markets Get What They Want from Washington?](#)

A flurry of executive orders and a new administration mean plenty of changes in Washington. But the markets are anticipating economic stimulus, faster vaccine distribution, and more. Can D.C. deliver?

Corporate News

[Catherine Golladay: 2020 Year in Review](#)

Our annual review of 2020's industry trends and business milestones is intended to keep you informed of developments and new opportunities in an ever-changing market, and to help you support your clients.

[Winter Business Update](#)

A few highlights from Schwab's February 2021 Business Update including commentary from CEO Walt Bettinger and CFO Peter Crawford.

Industry Events and Education

Upcoming webcasts

2021

Registration now open! Executive Series for Consultants
Speakers: Catherine Golladay, Brian Bender, Nathan Voris, Taylor Garlesky
The first webcast is Tuesday, April 13.

Tuesday, April 13 12:00 pm ET

[Register](#)

Tuesday, April 13 3:00 pm ET

[Register](#)

Schwab Market Talk Webcast Series: Our experts address your market & economic questions
Speakers: Liz Ann Sonders, Kathy Jones and Jeffrey Kleintop

Tuesday, April 6 11:00 am ET

[Register](#)

On Demand

The Art of Significant Storytelling and Story-selling Hall of Fame Speaker and Master Storyteller Dan Clark explains the difference between Success and Significance, defining sales as 'the transference of trust.'

[Register and watch](#)

What's Next? Charting the course for the retirement market

[Register and watch](#)

Cybersecurity and Data Protection

[Register and watch](#)

Conferences

PLANSPONSOR National Conference, 6/21 – 6/24, virtual

[Learn more](#) ¹

NAPA 401(k) Summit, 9/12 – 9/14, Las Vegas

[Learn more](#) ¹



Taylor Garlesky

Consultant Relations
Schwab Retirement Plan Services, Inc.
877-783-4372 | consultantsupport@schwab.com

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