



Schwab Stock Slices™ Now Available in PCRA^s¹

Schwab recently [announced](#) that its new Schwab Stock Slices™ service is now available to eligible **Personal Choice Retirement Account (PCRA)** holders. Schwab Stock Slices™ lets investors own any of America's leading companies in the S&P 500® for as little as \$5 each, even if their shares cost more. Investors can use the new service to purchase a single stock slice or up to 10 different Stock Slices™ at once, and they can hold slices of as many S&P 500 companies in their account as they wish through multiple purchases. Schwab Stock Slices™ are purchased commission-free online, just like regular stock trades at Schwab.

Industry Trends and Updates

[Participant Trends during Uncertain Times](#)

Schwab Retirement Plan Services continues to monitor participant behavior trends and proactively reach out to offer support, especially during this time of uncertainty. As a result, 40% more participants benefited from advice consultations in May and June, than those who simply contacted us on their own. To that end, we are proud that Charles Schwab & Co., Inc. has been ranked #1 in Retirement Plan Participant Satisfaction in the large plan segment by J.D. Power for the third year in a row².

See the full participant update [here](#), including most common planning terms, and trends in advice consultations, managed accounts, CARES distribution and in-plan ROTH conversions.

[SDBA Indicators Q1 2020 Report](#)

The Self-Directed Brokerage Account Indicators Report™ tracks the investment behaviors of employees who used the Schwab Personal Choice Retirement Account®* (PCRA) during this time period.

[Next up on Financial Decoder Podcast: Should You Roll Over Your Old 401\(k\)](#)

Each episode of [Financial Decoder](#) looks closely at one financial decision—and the biases that might cloud your judgment and cost you money. Host Mark Riepe, head of the Schwab Center for Financial Research, decodes the behavioral and psychological factors at play and shares strategies designed to improve the way you approach financial crossroads.

Regulatory and Legislative Updates

[Washington Watch for Retirement Plan Services](#)

Take a look at a number of key developments for plan sponsors and plan participants to be following in the latest [Washington Update](#). Schwab Retirement Plan Services provides this quarterly publication to consultants in an effort to help you stay current on the latest legislative and regulatory issues that could impact your clients' retirement plans.

Industry Events and Education

[Call series with Charles Schwab & Co., Inc. experts: What's ahead for the markets and economy?](#)

To support you during this time of market volatility related to coronavirus, Schwab is holding a monthly call series through the end of 2020. This series offers breaking economic and market news from Schwab experts to help institutional and financial professionals better serve their clients during this uncertain time. The next call is Tuesday, August 11.

Register [here](#) for upcoming sessions.

[SBEN Annual Education Conference](#) ³

Rescheduled: August 13-14, 2020

Le Meridien
Atlanta, GA

[NAPA 401\(k\) Summit](#) ³

Rescheduled: September 10-12, 2020

Orlando, FL

[PLANSPONSOR National Conference](#) ³

Virtual

September 21-25, 2020

Own your tomorrow.



The Schwab Center for Financial Research is a division of Charles Schwab & Co., Inc.

1. Schwab Personal Choice Retirement Account® (PCRA) is offered through Charles Schwab & Co., Inc., the registered broker/dealer, which also provides other brokerage and custody services to its customers.

*Approximate share prices as of June 1, 2020

All corporate names are for illustrative purposes only and are not a recommendation, offer to sell, or a solicitation of an offer to buy any security.

Schwab Stock Slices is not intended to be investment advice or a recommendation of any stock. Investing in stocks can be volatile and involves risk including loss of principal. Investors should consider their individual circumstances prior to investing.

The standard online \$0 commission does not apply to trades placed through a broker (\$25). See the Charles Schwab Pricing Guide for Retirement Plan Accounts for full fee and commission schedules.

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2. Charles Schwab received the highest numerical score in the large plan segment in the J.D. Power 2018-2019 and tied in the 2020 U.S. Retirement Plan Participant Satisfaction Studies of participants' satisfaction with their retirement plan provider. The 2020 study was based on 10,159 responses from retirement plan participants surveyed in February and March 2020. Your experiences may vary. Visit jdpower.com/awards. "Charles Schwab" is Charles Schwab & Co., Inc. for purposes of this award.

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