

you BELONG *here*

THE CHOICE FOR ELITE ADVISORS

Many elite advisors like you have started successful independent advisory firms with backing from Schwab Advisor Services.

We have a long track record of helping leading advisors build enduring businesses. Isn't it time to make a change that gives you the potential to achieve even greater success?

As an independent advisor, you control your professional destiny. You build your practice on the strength of your hard-earned experience and reputation as an industry leader. You call the shots and own the results.

As the leading custodian for independent investment advisors, Schwab Advisor Services custodies assets and provides support for approximately 200 advisors who manage more than \$1 billion in assets, including about 100 multifamily offices.* We deliver the services and support demanded at the top echelon of the industry. And during the recent financial turmoil, Schwab's stability has stood out.**

Today's financial landscape presents many opportunities. We can help you seize them, with knowledgeable support for your move to independence. Our experienced transition support consultants specialize in working with top-level advisors.

Your transition support will be led by a managing director and a business development officer who will bring in subject matter experts to guide you. And we can connect you with other advisors like you who have started their own firms, so you can hear about their experiences firsthand.

I would welcome the chance to discuss how Schwab can help you unlock the advantages of independence. Please feel free to contact me at 425-709-7504.

SINCERELY,



Jeff Blumenthal

*As of 6/30/2009

**Source: "Should Charles R. Schwab Aim Higher?" *BusinessWeek*, July 16, 2009