We know that advisors find it difficult to make technology purchase decisions. But receiving feedback from peers can make all the difference. That’s the idea behind Schwab OpenView MarketSquare—an online resource in which advisors who custody with Schwab Advisor Services™ can find product ratings and reviews based on the collective, real-world experiences of fellow advisors.

MarketSquare complements advisors’ product research, providing relevant information about technology vendors and products to help them make better-informed buying decisions. It will be accessible through the Schwab Intelligent Technologies™ website, enabling advisors to:

- Research new technology solutions and see product ratings and reviews from their peers, who understand the specific needs of independent advisors
- Link directly to a participating vendor’s website and contact information from their listing
- Share their experiences with others by submitting a review of their current technology

Benefits for Vendors

There are more than 7,000 Schwab Advisor Services clients who can access your product information on MarketSquare.

As a participating vendor, you will also receive these benefits, at no charge:

- A dedicated page profiling your company and contact information, including a summary of your product’s or service’s key features
- The opportunity to increase visibility with an engaged audience of technology influencers and decision makers
- Valuable insights and information that you can use to gauge—and improve—customer satisfaction

Contact Us

Vendors interested in the MarketSquare program can email providers@schwabintelligenttechnologies.com to learn more.
How We Consolidate Advisor Ratings and Reviews

Our process is designed to provide a meaningful summary of reviewer feedback. Advisors rate products on a five-point scale, across several categories, and the average rating is then calculated for each category. The overall rating is the average of the five category ratings. They will also have the option to provide comments. The MarketSquare team analyzes the reviews to identify the prevailing themes and develops a summarized review, which may incorporate relevant quotes from advisors’ comments.

The sample below features a review of Schwab Performance Technologies’ PortfolioCenter® solution.*

Portfolio Center® Review

Advisor Feedback

<table>
<thead>
<tr>
<th>Overall Rating</th>
<th>Consolidated Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product’s features and functionality</td>
<td>Overall, reviewers had generally positive feedback regarding PortfolioCenter. Several firms had used PortfolioCenter for many years—however, with that longevity came some concerns that areas of the program can feel dated. Nonetheless, it’s a “reliable product,” according to many reviewers, with solid features and functionality. Some considered it “integral to the functioning of our business.”</td>
</tr>
<tr>
<td>Integration with other tools</td>
<td>Areas where reviewers felt the solution needed improvement included “still weak” reporting capabilities—as one reviewer noted, “Presentation Studio has a long way to go…” Users also commented that the interface has a “vintage” feel that could benefit from an update.</td>
</tr>
<tr>
<td>Initial transition and setup with vendor</td>
<td>Reviewers’ opinions were varied regarding PortfolioCenter’s ease of use, though a majority of users considered the program simple to learn and implement. A smaller group of reviewers also hoped that more enhancements for the system are on the way. Support is considered a strength, with consistently positive feedback, highlighting a team that’s friendly, “responsive” and “extremely helpful.”</td>
</tr>
<tr>
<td>Customer service and support</td>
<td></td>
</tr>
<tr>
<td>Value for the cost</td>
<td></td>
</tr>
</tbody>
</table>

About Schwab Performance Technologies

Vendor Comments

Our large, loyal client base is extremely important to our business, and that’s why we continuously invest in improvements to our products, putting feedback from advisors like you into action. We deliver multiple product updates each year based on some of the most requested features. Recently, we enhanced the Client Presentations reporting capabilities to provide greater customization and introduced new, easy-to-use billing statements. Advisors can also look forward to a hosted version of PortfolioCenter in the coming months that will provide anytime, anywhere access to data and reports without the burden of technology infrastructure management.

Product: PortfolioCenter
Category: Portfolio Management
Serving RIA Industry Since: 1985
Discount for Schwab Clients?: Yes  Learn More
Phone: 800-528-9595
Email: pt-oakes@schwabpt.com
Website: schwabpt.com

Description (provided by vendor)

Industry-leading portfolio management and performance reporting solution.
- Multicustodial view of your clients’ investment information
- Advanced data management and performance measurement tools
- Customizable accounting, reporting, and billing functions

Other Reviews for This Vendor

Schwab OpenView Integrated Office™

* PortfolioCenter Review reflects advisor ratings and reviews submitted through January 2013. Ratings and reviews are consolidations of advisors’ submissions. No opinion or endorsement is made or implied by Schwab.

Schwab OpenView MarketSquare™ is a product of Schwab Intelligent Technologies™ (“SIT”). Schwab Advisor Services™ serves independent investment advisory firms and includes the technology solutions of Performance Technologies, Inc. (doing business as Schwab Intelligent Technologies and Schwab Performance Technologies® (“SPT”)), and the custody, trading, and support services of Charles Schwab & Co., Inc. (“CS&Co”), a registered broker-dealer and member SIPC. Portfolio Center® is a product of SPT. SIT, SPT, and CS&Co are separate companies affiliated as subsidiaries of The Charles Schwab Corporation, but their products and services are independent of each other.

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