

## News Release

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### **SCHWAB INTRODUCES NEW ONLINE MANAGEMENT SYSTEM FOR STOCK PLAN ADMINISTRATORS**

*Schwab StockPlanManager™ offers administrators greater control and convenience*

**SAN FRANCISCO – June 16, 2003** – Charles Schwab Corporate Services recently introduced StockPlanManager™, a web-based system to help stock plan administrators manage their employee stock plans.

“In today’s increasingly regulated environment, stock plan administrators face additional pressures to carefully monitor and manage their equity benefit plans. StockPlanManager is designed to provide a new level of control for administrators by giving them immediate online access to view and update a broad array of parameters related to their plan,” said Ben Brigeman, senior vice president, Charles Schwab Corporate Services.

StockPlanManager provides secure access to employee demographic, grant and exercise information and allows the transfer of data to and from Schwab in real time<sup>1</sup>. For example, an administrator could use the system to immediately suspend trading for a terminated employee or generate a report on demand to help reconcile accounts.

StockPlanManager enables administrators to:

- Access and view stock plan data in real time
- Tailor access privileges for administrative personnel based on job type, location, or group
- Generate real-time reports online rather than via batch or end-of-day report requests
- Input data and make changes in real time that update the database for all users
- Set blackout periods for individuals

“StockPlanManager is available to our corporate stock plan clients at no additional cost. This new system is a result of our ongoing investment in technology and automation to benefit clients across Charles Schwab Corporate Services,” Brigeman said.

#### **About Charles Schwab Corporate Services**

Charles Schwab Corporate Services provides individual investing support services through employers, including employee retirement and stock option plans, IRA rollovers and individual/personal accounts. Charles Schwab Corporate Services also offers retirement plan services including recordkeeping and related services through Schwab Retirement Plan Services, Inc., proprietary retirement plan recordkeeping systems through Schwab Retirement Technologies™, trustee and custodial services through The Charles Schwab Trust Company, and the Schwab Personal Choice Retirement Account® (PCRA) (self-directed brokerage account through Charles Schwab & Co., Inc.). Total client assets in employer-sponsored retirement plans at Schwab equaled \$90 billion at the end of March 2003. Schwab Retirement Plan Services, Inc., Schwab Retirement Technologies and The Charles Schwab Trust Company are affiliates of Charles Schwab & Co., Inc., and are wholly owned subsidiaries of The Charles Schwab Corporation.

The Charles Schwab Corporation (NYSE:SCH), through Charles Schwab & Co., Inc. (Member SIPC/NYSE), U.S. Trust Corporation, CyberTrader, Inc. (Member SIPC/NASD) and its other operating subsidiaries, is one of the nation's largest financial services firms.

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<sup>1</sup> Access to Electronic Services may be limited to certain clients and may require the use of a computer and Internet connection.