

# News Release

## Contacts

Mike Peterson	Dewey Hammond
Charles Schwab	Edelman
330.908.4334	415-486-3211
mike.peterson@schwab.com	dewey.hammond@edelman.com

## **SCHWAB HELPS CLIENTS PROMOTE 401(k) DAY “Retirement Reality” Tools Engage Employees, Encourage Retirement Planning**

**SAN FRANCISCO – September 1, 2004** – Charles Schwab Corporate Services has rolled out a new suite of online, print-ready tools to help its clients promote 401(k) Day on September 7. The retirement industry has designated the day after Labor Day as 401(k) Day to remind Americans about the importance of planning for retirement.

The colorful suite of tools is packaged in an “E-Kit” available online for Schwab plan sponsor clients. The E-Kit includes ideas and detailed instructions for plan sponsors to celebrate 401(k) day, an employee announcement handout, poster, booth banner, postcard, and an entertaining quiz that allows employees to test their retirement planning knowledge. These ready-to-use print materials provide an effective way to reach employees with important messages about retirement planning.

Schwab also developed a special website for employees to access retirement planning articles and participate in schWEBcasts™ with a 401(k) Day theme. SchWEBcasts are Schwab’s online, virtual classroom presentations, which provide valuable education for employees.

To engage employees this year, Schwab chose a fun, topical theme – “Retirement Reality.” The theme capitalizes on the popularity of reality television shows while emphasizing the importance of planning for retirement.

The E-kit has already generated great interest among Schwab clients. The website for plan sponsors received more than 900 visits in the first several days after launch. Schwab expects usage will continue to grow as 401(k) day approaches.

“Our primary goal has always been to help our clients’ employees prepare for their financial future. 401(k) Day is a great event that gives us the opportunity to put special emphasis on education and retirement planning,” said Trish Cox, vice president, participant services and education, Charles Schwab Corporate Services.

## **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.). These entities are affiliates of each other and are wholly owned subsidiaries of The Charles Schwab Corporation. Total client assets in employer-sponsored retirement plans at Schwab equaled \$121 billion at the end of June 2004.

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. (0804-10020)