



NEWS RELEASE

Schwab Advisor Services Brings Industry Providers Together for Third-Party Technology Forum

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Showcases developer portal underscoring commitment to expanding third-party integrations supporting independent advisor firms

For news/updates from the event, follow @Schwab4RIAs #FintechForum

WESTLAKE, Texas--(BUSINESS WIRE)-- Schwab Advisor Services kicked off its first virtual Technology Forum this week for technology providers who work with Schwab and TD Ameritrade Institutional. Held over two days, more than 150 of the independent advisor industry's top technology professionals gathered online to share ideas and hear updates from executives at Schwab and TD Ameritrade about the path to building an industry-leading technology platform for independent advisors.

The invite-only event is for companies that are on, or are integrating onto, the Schwab and TD Ameritrade Institutional technology platforms. The providers offer RIAs a broad spectrum of business-critical solutions, including financial planning, CRM, portfolio management, research and analytics, cybersecurity, compliance, **and more.**

"Third-party integration is a cornerstone of our technology roadmap, and we continue to increase engagement with our partners and invest in our technology capabilities to provide advisors with a comprehensive menu of options for building and growing their tech stacks in today's world," said Kartik Srinivasan, senior managing director, Digital Advisor Solutions at Charles Schwab. "Together with our TD Ameritrade colleagues, we are excited about what the future holds, and are eager to work with our third-party technology community to consider how we collectively serve the needs of the vibrant and growing independent advisor space."



New Developer Portal

During the event, Schwab showcased a self-service developer portal that will provide technology providers with a more accessible, efficient process for API development. The developer portal will allow participants to access sample data and test integrations with the Schwab platform through a modernized user experience.

Over the last three years, Schwab has seen a 100 percent increase in its number of API integration partners and currently has more than 250 active points of integration with these partners. Likewise, TD Ameritrade's integrations have expanded, currently standing at 175 active points of integration.

All future API capabilities will also be made available in the new portal. Schwab and TD Ameritrade are working closely on new APIs that start to bring the two custody platforms together. Initially, this includes new trading APIs, as well as APIs to the iRebal portfolio rebalancing software, and new APIs to support Move Money workflows.

"We've developed a leading-edge technology platform for RIAs by listening closely to advisors about their operational challenges and working with the technology vendors that serve them to deliver solutions," said Chris Valleley, director, Institutional Technology Solutions, TD Ameritrade Institutional. "We're thrilled to continue this dialogue at our inaugural Forum with our Schwab colleagues, and look forward to collaborating on solutions that will set a new standard of innovation for this industry."

About Charles Schwab

At Charles Schwab we believe in the power of investing to help individuals create a better tomorrow. We have a history of challenging the status quo in our industry, innovating in ways that benefit investors and the advisors and employers who serve them, and championing our clients' goals with passion and integrity.

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