

Strategy Desk

Learn ways to manage market and volatility risks more effectively, with expert trading strategy education.

As part of Schwab's Trading Services, the Strategy Desk offers an array of educational resources to you. Our goal is to provide you with more tools and strategies to help your clients pursue their investing goals. Whether you are looking for alternate ways to potentially generate portfolio income, protect positions, or mitigate risk in concentrated holdings with options strategies, our strategists can help.

Our free service also includes:

- One-on-one strategy consultations
- Weekly trading webcast series
- Market insights

One-on-one strategy consultations

Our Strategy Desk consults with you about your portfolio-specific needs. We can help you with a wide range of options strategies, including:

- Portfolio hedging
- Concentrated position management
- Income generation
- Stock replacement and repair

We can also help you identify potential benefits and risks to consider when using options and how to effectively communicate those concepts to clients. As part of the service, we provide an educational write-up of the strategies discussed, the risks and benefits of each strategy, and risk profile graphs to visualize the strategy.

Weekly webcasts

Mark your calendars! Every Tuesday at 4:30 p.m. ET our strategists and special guests will cover a variety of trading topics. Join us to get insight on:

- Options strategies
- Market commentary
- Technical analysis
- Implementing trading strategies

Market insights: Macro Monday and trading articles

Macro Monday, our one-page, high-level market brief delivered to your inbox each Monday morning, includes:

- Updated levels and YTD returns for major equity indices, sectors, commodities, and interest rates
- Review of last week's market catalysts and the current week's outlook
- A chart of the week focusing on technical analysis or economic data
- Calendar of the week's important economic data

The Strategy Desk is part of a comprehensive suite of trading services designed to help you optimize your client's investments. Our services include a variety of trading and investment choices, powerful trading platforms, research, education, and assistance from seasoned trading professionals.

To access additional resources go to advisorservices.schwab.com/strategydesk

Connect with an experienced strategist today.

Call: 800-227-0816

Email: strategydesk@schwab.com

Options are not suitable for all investors as the special risks inherent to options trading may expose investors to potentially rapid and substantial losses. Options trading privileges subject to Schwab review and approval. Please read [Characteristics and Risks of Standardized Options \(www.optionsclearing.com/about/publications/character-risks.jsp\)](http://www.optionsclearing.com/about/publications/character-risks.jsp) before investing in options.

Market volatility, volume and system availability may delay account access and trade executions. Prices can change quickly in fast market conditions, resulting in an execution price different from the quote displayed at order entry. Execution price, speed and liquidity, and account access can be affected by many factors, including market volatility, size and type of order and available market centers. Orders are filled by independent third parties.

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