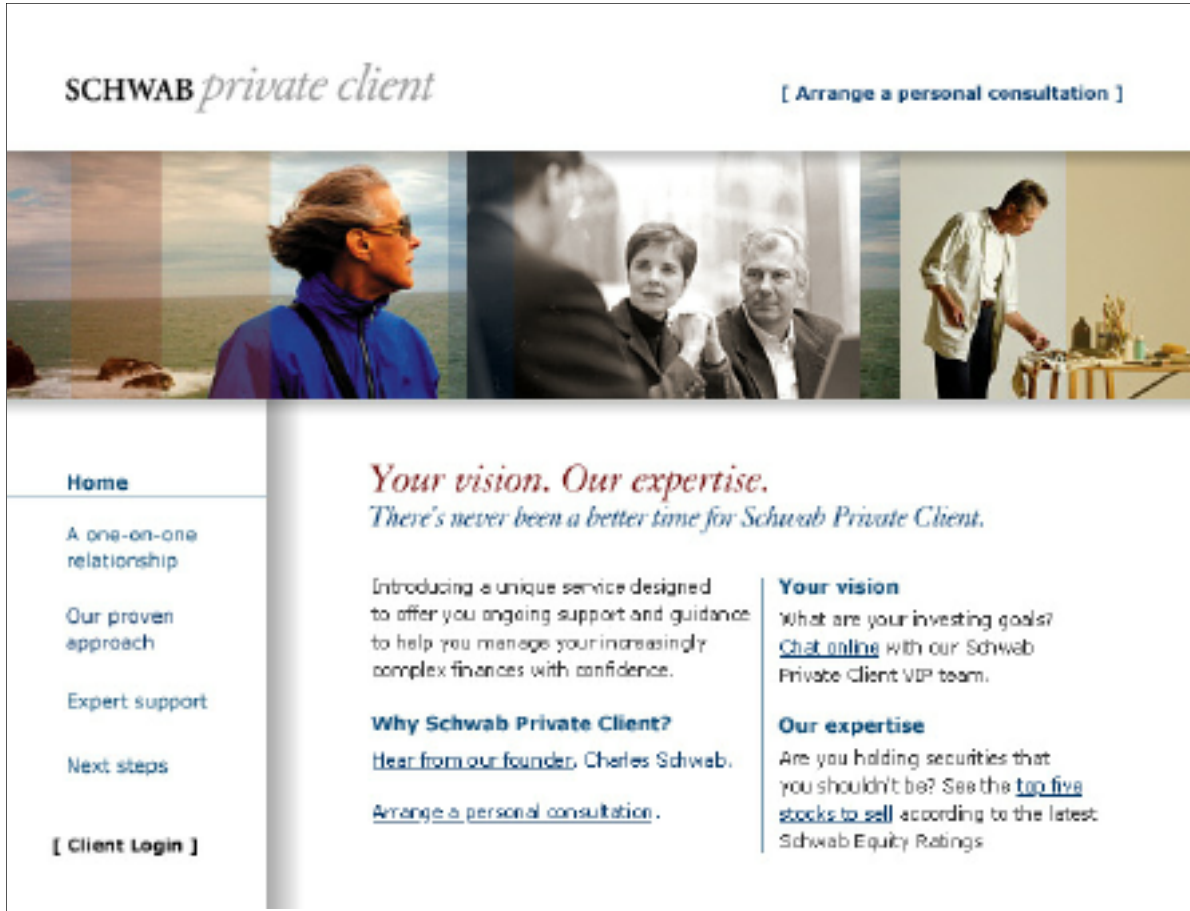




CONCEPT 1:

*Your Vision.
Our Expertise.*



CONCEPT

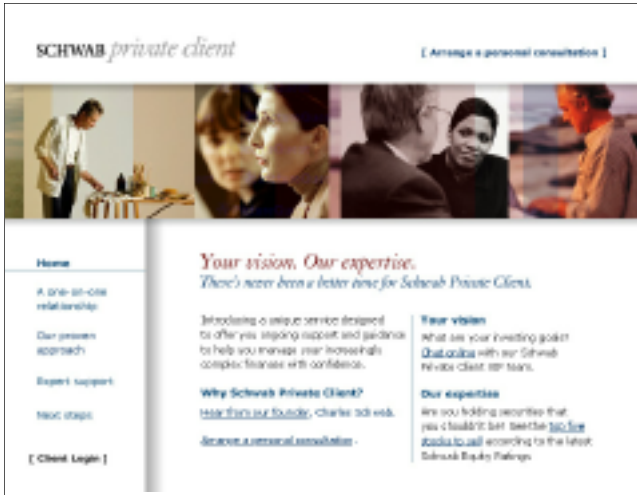
As this a new service for Schwab, we want to provide a unified Schwab Private Client experience. So in the spirit of integration, this concept most closely aligns with the printed brochure. But an online brochure, it isn't—the site maximizes the online medium through interactive elements that enhance the experience and move our target to action.

PHASE 1 MINIMUM CONTENT

Description of SPC, SPC locator, Email lead form, Brochure order lead form, 1-800 # available throughout site

ADDITIONAL CONTENT IDEAS

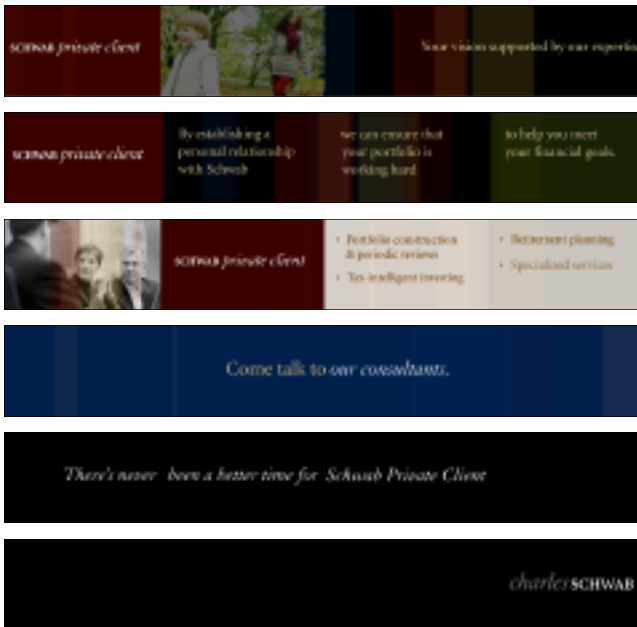
Preloading interstitial to establish the aspirational tone of the service, leveraging work from the May 16 PR event Plasma screen work.



ANIMATION SAMPLE

Photographic canvas can be a motion graphic, presenting a variety of successful, aspirational lifestyle shots, coupled with images representing the one-on-one relationship and the service provided to SPC clients.

Still shown above indicative of a right-to-left panning of the composite, while subtly colored rectangles move over the top, primarily left-to-right.



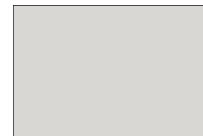
INTERSTITIAL SOURCE

Stills from a Flash animation designed to play back on 4-screen-wide plasma system. Recommend refining message to shorter message providing 1 or 2 key benefits plus desired net impression statement or key takeaway.



Pre-loading interstitial (skip option)

Home Page



Demo experience (phase 2 or 3)

A One-on-One Relationship

Description of the SPC service, focused on the one-on-one relationship, individualized support and financial expertise tailored to your particular needs.

Includes phone #, mail and email lead access.

Our Proven Approach

Highlights the comprehensive yet personal approach providing a new perspective on your entire financial situation. The methodology of the service model; from initial discussions through ongoing monitoring

Expert Support

Description of additional expert support through dedicated team, research and online tools. May include SPCC profile or other specialized expert.

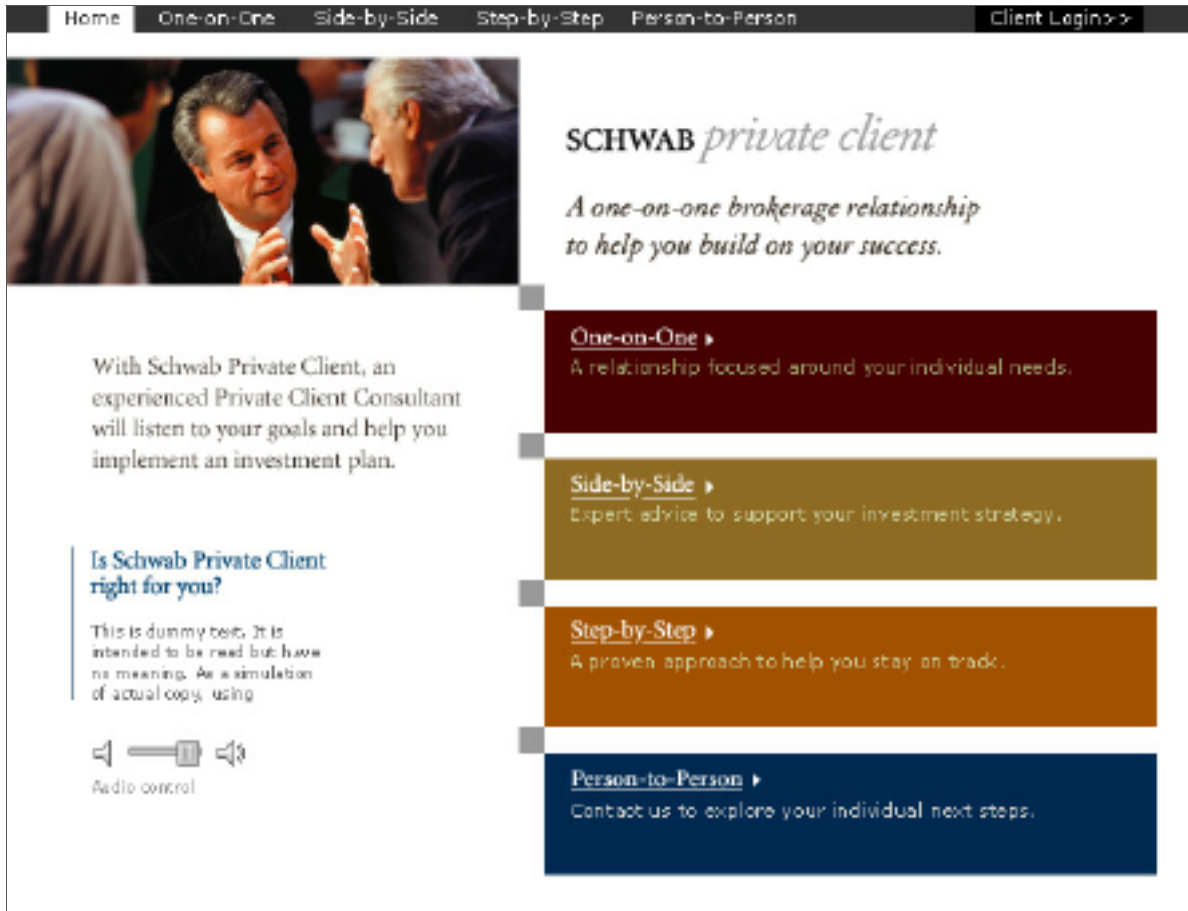
Next Steps

The "Contact Us" section. Invitation to schedule an appointment, find the nearest SPC investment center, Email a question, Request a printed brochure and more.



CONCEPT 2:

One-on-One.



CONCEPT

This concept focuses on what truly sets Schwab Private Client apart: the One-on-One brokerage relationship. We attempt to capture the essence of the relationship through the content, tone, organization and design of this site.

APPROACH

Use of similarly constructed phrasing to name and organize the content to continually reinforce the relationship theme. One-on-One, Side-by-Side, Step-by-Step, Person-to-Person. "Is SPC right for you?" is positioned as a link off the home page to engage user immediately in a dialogue. Phase 1 implementation to be Email & Phone.

PHASE 1 MINIMUM CONTENT

Description of SPC. SPC locator, Email lead form, Brochure order lead form, 1-800 # available throughout site.

ADDITIONAL CONTENT IDEAS

Ambient classical soundtrack to create atmosphere of affluence and success. User has off / on / volume control.



INTERACTION SAMPLE

As user moves cursor over one of the large rectangle shapes, descriptive text appears to eliminate any confusion about the site content organization. Simultaneously, a supporting duotone image swaps into the main image space, furthering the relationship theme.



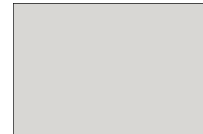
INTERACTION SAMPLE

A second feature to mitigate user confusion about navigation, agency suggests implementation of mouseover descriptions in support of the top navigation. Upon mouseover, color behind link changes, reinforcing relationship between top nav and foreground color blocks.



Pre-loading interstitial (skip option)

Home Page



Demo experience (phase 2 or 3)

One-on-One

Description of the SPC service, focused on the relationship, individualized support and financial expertise tailored to your particular needs.

Includes phone #, Mail and Email lead access. SPCC profiles should be accessible here.

Side-by-Side

Description of additional expert support through dedicated team, research and online tools. May include SPCC profile or other specialized expert.

Step-by-step

Highlights the comprehensive yet personal approach providing a new perspective on your entire financial situation. The methodology of the service model; from initial discussions through ongoing monitoring.

Person-to-Person

The “Contact Us” section. Invitation to schedule an appointment, find the nearest SPC investment center, Email a question, Request a printed brochure and more.




CONCEPT 3:

*The Voice
of Experience.*

HOME | HEAR FROM CHARLES SCHWAB | A ONE-ON-ONE RELATIONSHIP | A PROVEN APPROACH | EXPERT SUPPORT | NEXT STEPS

SCHWAB *private client* [Contact the Schwab Private Client VIP team >](#)



Jamie Walters
Schwab Private Client Consultant
Advisor Credentials/Expertise
This is body copy. It is not to be mistaken for real copy.
[\[SPC consultant story \]](#)

Jason Wallie
Client
Goals/Aspirations
This is body copy. It is not to be mistaken for real copy.
[\[client story \]](#)

The Voice of Experience

Introducing a new kind of financial relationship. Professional yet personal. Completely trustworthy. And focused on your individual needs. Join us as our Private Client Consultants share some unique insights into helping clients strive toward their financial dreams.

Why consider Schwab Private Client? Hear from our founder [Charles Schwab](#).

[Arrange an appointment](#). How would you like us to contact you?

CONCEPT

Incorporating a number of personal profiles, this concept explores and emphasizes the notions of 'experience' and 'relationship.' By giving voice to Private Client Consultants and Charles Schwab, the site builds on our history, is emotional and inspiring, and reflects our passion for serving investors. After all, we have real life experience to share. And as the competition asks, "Do they have the experience to really pull this off?" our site answers back with a resounding yes.

PHASE 1 MINIMUM CONTENT


Personal profiles, description of Schwab Private Client, email and brochure lead forms, PCC locator and 800# throughout the site

ADDITIONAL CONTENT IDEAS

Optional audio quotes to add dimension to the experience

HOME | HEAR FROM CHARLES SCHWAB | A ONE-ON-ONE RELATIONSHIP | A PROVEN APPROACH | EXPERT SUPPORT | NEXT STEPS

SCHWAB *private client* Contact the Schwab Private Client VIP team >



"We understand how important it is to have a one-on-one relationship, to have a feeling of trust and confidence that you're moving in the right direction."

Charles B. Schwab
Chairman/CEO
This is body copy. It is not to be mistaken for real copy. It is only filling the space until final copy is written.

Lorem ipsum dolore sed es nostrus.
This is dummy copy. It is not intended to be read. This is dummy copy it is not intended to be read. This is dummy copy. It is not intended to be read. This is dummy copy. It is not intended to be read. This is dummy copy it is not intended to be read. This is dummy copy. It is not intended to be read. This is fake copy it is not intended to be read.


[Arrange an appointment](#), How would you like us to contact you?

INTERACTION SAMPLE


As user clicks through from home page an image of Charles Schwab and his philosophy on Schwab Private Client appear. Ideally, we will include audio as the true "Voice of Experience."

HOME | HEAR FROM CHARLES SCHWAB | A ONE-ON-ONE RELATIONSHIP | A PROVEN APPROACH | EXPERT SUPPORT | NEXT STEPS

SCHWAB *private client* Contact the Schwab Private Client VIP team >



Jamie Walters
Schwab Private Client Consultant
Advisor Credentials/Expertise
This is body copy. It is not to be mistaken for real copy.
[\[SPC consultant story \]](#)



Jason Wallie
Client
Goals/Aspirations
This is body copy. It is not to be mistaken for real copy.
[\[client story \]](#)

Private Client Specialist Online

SCHWAB *private client*

Thomas (SPC team member)
Hello Mr. Moore, how can I help advise you today?

What do you recommend to help diversify and grow my investments?

Send
End Call

Powered By LivePerson.com™

The Voice of Experience
Introducing a new kind of financial relationship. Professional yet personal. Completely trustworthy. And focused on your individual needs. Join us as our Private Client Consultants share some unique insights into helping clients strive toward their financial dreams.

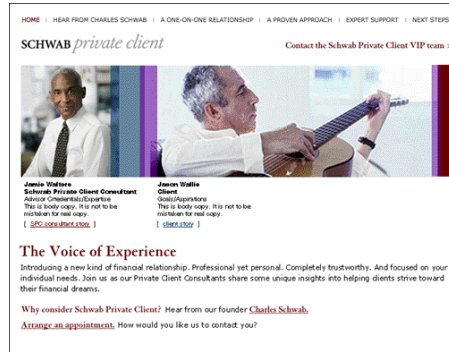
Why consider Schwab Private Client? Hear from our founder [Charles Schwab](#).

[Arrange an appointment](#), How would you like us to contact you?

INTERACTION SAMPLE

As user clicks through from home page, later phases might include sign up for rep chat or instant messaging.

Home Page



Demo experience
(phase 2 or 3)

Hear from Charles Schwab

Quote from Charles Schwab about the importance of a one-on-one broker-age relationship.

A One-on-One Relationship

Description of the SPC service, focused on the one-on-one relationship, individualized support and financial expertise tailored to your particular needs.

Includes phone #, mail and email lead access.

Our Proven Approach

Highlights the comprehensive yet personal approach providing a new perspective on your entire financial situation. The methodology of the service model; from initial discussions through ongoing monitoring

Expert Support

Description of additional expert support through dedicated team, research and online tools. May include SPCC profile or other specialized expert.

Next Steps

The "Contact Us" section. Invitation to schedule an appointment, find the nearest SPC investment center, Email a question, Request a printed brochure and more.

Content phasing possibilities

	Demonstrate SPC	Generate Leads	Personality	Support Content
Phase 1	Text descriptions to define the service supported by aspirational lifestyle and situational financial services photography	Phone number, email and brochure order forms; Is SPC right for you? user-need-focused questions + users' preferred contact method	Interstitial to set tone of service / site; Audio as soundtrack	Find the SPC Investment Center nearest you; Link to UST site; or Link to PSE Tool; SPCC Profiles in text / photo form
Phase 2	Free-standing demo establishing SPC personality, and introducing users to the methodology and benefits	Add the SPC newsletter + any offer that may be associated with fall campaign?	In-page element on Home page to demonstrate aspirational and relationship; Audio as the "voice of experience" drawn from SPCC interviews	Where are you on the Wealth Cycle? inter-action piece; SPCC Profiles in text / photo and audio form
Phase 3	Free-standing demo to enable users to "test drive" an SPC dummy account (require full lead to gain access) for a limited time (1-2 days)	Add access to sample reports available to clients with users' preferred delivery option; "Sign up" for Rep Chat or Instant Messaging	Integrate additional intra-page elements to illustrate supporting points (comprehensive, customized etc); Audio / Video of SPCC profiles and client testimonial	Bring log-in fields into site to enable any clients to gain access to their accounts via this site; SPCC Profiles in text / photo, audio and video form

Prospect Site Marketing

Any mini-site will fail if it does not benefit from marketing efforts to bring traffic to the site. We have considered a few options for your consideration:

- HTML email = controlled presentation that families with the design of the site (Phase 1)
- HTML email with embedded "interstitial" (users who arrive at the site via this spot would bypass interstitial upon arrival (Phase 1 or 2)
- HTML email with link to any stand-alone demos (Phase 2 or 3)
- Banner advertising on CBS MarketWatch and Schwab.com