Do you have Schwab accounts?

How to add management at Schwab

By employing active management, we respond to shifting market environments in real time and seek to provide investors with competitive returns while reducing risk.

Adding Flexible Plan management to an existing non-PCRA account is easy:

1. View the available FPI strategies at Schwab Institutional.
2. Complete Flexible Plan's client agreement.
   (Also known as an Investment Management Agreement)
3. Complete a Limited Power of Attorney.
4. We'll take it from there.

Have questions? Call us 800-347-3539, ext. 2.
Tips for establishing new non-PCRA accounts.

Flexible Plan Investments, Ltd.
Your partner in active wealth management since 1981

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