



Program spotlight

Build your ETF expertise with ETF Know:How™

Exclusively from Charles Schwab Investment Management

Gain a competitive advantage with tools and insights that help refine your ETF strategy.

We take our commitment to supporting financial professionals seriously. One key element of that commitment is sharing our knowledge and perspectives to help you optimize client outcomes.

No matter how you're using ETFs today, the ETF Know:How program can help you take the next step in meeting the needs of tomorrow's investors.

To learn more about ETF Know:How, call 877-824-5615 or visit schwabfunds.com/etfknowhow.

What is ETF Know:How

ETF Know:How is a full-spectrum curriculum of ETF tools, resources, and insights created for all levels of ETF expertise. You can access and download resources online, talk with our ETF team, or host educational presentations at meetings or in your office. It's up to you.

Experience ETF Know:How

Think of ETF Know:How as your consulting partner, bringing you the level of ETF analysis and insight you need to build your ETF knowledge and help you employ ETFs in your client portfolios.



Why leverage ETF Know:How

ETF Know:How has practical implications for your business and your clients, offering resources to help you:

- Track ETF market trends
- Build your ETF knowledge and skills
- Develop strategies for employing ETFs in client portfolios
- Understand evolving investor attitudes about ETFs
- Explain ETFs simply and clearly to your clients

Put ETF Know:How™ to work for you

The resources assembled in the ETF Know:How program are designed to give you a 360-degree view of ETF investing, with tactical steps to help support your business—from client engagement to portfolio implementation.

Market insights

Stay current with monthly and quarterly reviews of ETF market trends and developments.

ETF expertise

Deepen your understanding of ETF mechanics and structures with our educational presentations and articles, and gain practical tips to evaluate and identify the ETFs that best meet your clients' needs.

Portfolio strategies

Explore ETF strategies, portfolio implementation approaches, and trading best practices through articles, in-person educational presentations, webcasts, online videos, and more.

Research findings

Reference our annual survey of ETF investors and other proprietary investment research to support your client conversations and ETF strategy.

Leadership perspectives

Browse articles, blog posts, and videos by the executives and strategists of Charles Schwab Investment Management for insights and ongoing perspective on ETF topics.



To learn more about
ETF Know:How and
how to advance your
ETF business, call
877-824-5615 or visit
**[schwabfunds.com/
etfknowhow](https://schwabfunds.com/etfknowhow)**.

Charles Schwab Investment Management

With a straightforward lineup of core products and solutions for building the foundation of a portfolio, Charles Schwab Investment Management advocates for investors of all sizes with a steadfast focus on lowering costs and reducing unnecessary complexity.