



## FOR IMMEDIATE RELEASE

### Vidarrow Investment Advisors Selects Charles Schwab & Co. as Custodian Provider

**Arlington Heights, IL – December 10, 2024** – Vidarrow Investment Advisors, an independent registered investment advisory firm dedicated to empowering clients through personalized financial strategies, today announced a strategic alliance with Charles Schwab & Co. (“Schwab”) as its primary custodian. This collaboration marks a significant milestone for Vidarrow, enabling the firm to enhance its service offerings and deliver an even more exceptional client experience.

“By selecting Charles Schwab & Co., we are aligning ourselves with a trusted industry leader that shares our commitment to client-centricity and innovation,” said Luke Sauter, President and CEO of Vidarrow. “This alliance empowers us to provide our clients with a comprehensive suite of investment solutions, advanced technology, and dedicated support, all designed to help them achieve their long-term financial goals.”

As the leading custodian for independent investment advisors, Charles Schwab & Co. offers a wide range of benefits to Vidarrow including:

- **Advanced Technology:** Leveraging cutting-edge technology, Schwab provides efficient tools and platforms to streamline operations and improve client service. This includes advanced trading platforms, portfolio management tools, and client portals that offer real-time access to account information and market insights.
- **Comprehensive Product Offerings:** Vidarrow can construct tailored portfolios to meet individual client needs by leveraging Schwab’s diverse range of investment products, including equities, ETFs, mutual funds, and alternative investments. This broad range of options allows Vidarrow to implement sophisticated investment strategies and diversify client portfolios to manage risk effectively.
- **Robust Security and Compliance:** Schwab prioritizes security and adheres to stringent regulatory standards, safeguarding client assets and protecting sensitive information. The firm employs advanced security measures, including encryption, firewall protection, and identity verification, to ensure the highest level of security.
- **Dedicated Client Support:** Schwab provides exceptional client support, offering personalized assistance and addressing inquiries promptly. Clients of Vidarrow can access a dedicated team of professionals who are knowledgeable and responsive, ensuring a seamless and efficient client experience.

“When choosing a custodian, it was crucial for Vidarrow to prioritize the safety and security of our clients’ assets. Charles Schwab & Co. is a proven leader in the industry, with a strong track



record of financial stability and a commitment to client satisfaction. Their extensive experience, robust infrastructure, and unwavering dedication to security make them the ideal company to safeguard our clients' investments. The financial strength of their company further solidified our decision, as their financials included \$10.72 billion in annual net revenue, \$3.7 billion in annual net income, \$4.04 trillion in assets and an enviable 45.2% pre-tax profit margin.

Additionally, it was important for Vidarrow to choose a custodian who had the ability to support diversified portfolios for sophisticated clients. With Schwab, we are now able to expand our clients' options with access to alternative investments such as hedge funds, private equity, and real estate along with alternative income strategies," said Sauter.

Vidarrow's clients will receive the following benefits by maintaining their accounts at Schwab:

- No account service fees (including no IRA service fees)
- Zero-dollar commissions on online stock, ETF, and options trades
- Year-end reporting
- Online account access to real-time positions, transactions, quotes, and market news
- Convenient account access through a specialized team of service representatives for administration and technical support

### **About Vidarrow**

Vidarrow Investment Advisors is an independent registered investment advisory firm committed to providing personalized financial advice and investment management services. With a focus on delivering exceptional service and building long-term relationships with clients, Vidarrow takes a comprehensive approach to wealth management, considering the unique financial goals and risk tolerance of each client.

### **About Charles Schwab & Co.**

Charles Schwab & Co., a subsidiary of The Charles Schwab Corporation, is a leading provider of financial services, including brokerage, banking, advisory, and retirement services. With a focus on innovation and client satisfaction, Schwab empowers individuals and institutions to achieve their financial goals through a range of products, services, and technology solutions.

### **Disclosures**

Vidarrow ("Vidarrow Investment Advisors") is a registered investment advisor offering advisory services in the State of Illinois and in other jurisdictions where exempt. Registration does not imply a certain level of skill or training. The information in this press release is not intended as tax, accounting or legal advice, as an offer or solicitation of an offer to buy or sell, or as an endorsement of any company, security, fund, or other securities or non-securities offering. This

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