



Asset
Management

December 12, 2025

Notice of Updates to the Charles Schwab Investment Management, Inc. Disclosure Brochure (Form ADV Part 2A)

The following summarizes the material changes effective December 12, 2025, to the Charles Schwab Investment Management, Inc. (“CSIM”) disclosure brochure:

- CSIM’s principal office and place of business is being temporarily moved to its 9800 Schwab Way, Lone Tree, Colorado 80124 location, while the San Francisco office is being relocated. CSIM expects to return its principal office and place of business to San Francisco, California in the first half of 2026.
- Disclosures related to the Schwab Intelligent Portfolios® Premium and Schwab Intelligent Income® have been removed.



This Page Left Blank Intentionally