



News release

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BAHEP welcomes Charles Schwab & Co., Inc.

BAY AREA HOUSTON, TEXAS – Since its founding in 1971, Charles Schwab & Co., Inc. has grown from a small discount brokerage to a leading investment services firm with more total assets than any publicly traded investment services firm in the U.S., the #1 custodian for independent advisors, and a leader in asset management and retirement planning. The Webster, Texas, office of the firm has recently joined the Bay Area Houston Economic Partnership.

BAHEP President Bob Mitchell commented, “Investing in the future is one of the most important financial decisions one can make. Most of us need guidance in navigating the world of investments, and Charles Schwab & Co., Inc. has been providing such guidance successfully for almost five decades. We are happy to welcome Schwab’s Webster office as one of our newest members.”

Danny Jones is a vice president and senior financial consultant with Charles Schwab & Co., Inc. and will represent the Webster office within BAHEP. He said, “At Schwab we ‘always put the client first.’ Schwab was built around this simple idea, and, from my perspective, Schwab and BAHEP have this trait very much in common. I look forward to working together.”

Jones also offered more about Schwab saying, “At Schwab, we set out to challenge the status quo and look for ways to offer our clients more value and a better experience. We believe in the power of investing, are champions of investors, and look at the world through our clients’ eyes in every perspective of what we do. We offer investors a contemporary, full-service approach to build and manage their wealth. We help investors, employers, and employees take ownership of their financial futures.”

Schwab’s clients include families, business owners, and institutions. The Webster office is located at 19205 Gulf Freeway. For additional information, call 281.486.2514 or visit www.schwab.com.

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