



Performance

Account or Portfolio

Corporate

...037

From

01/01/2025

To

11/18/2025

3M1Y2024

YTD

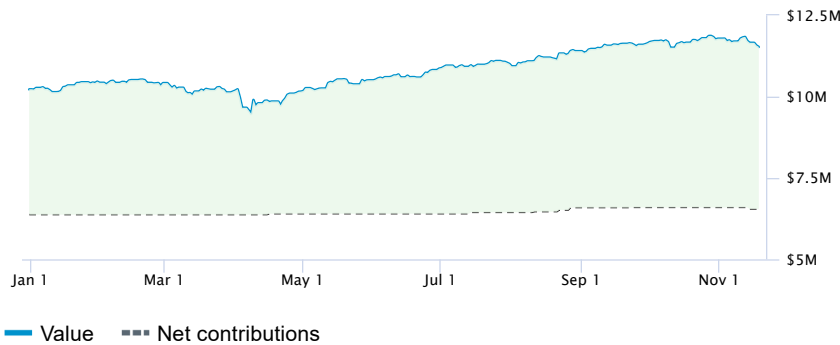
Max

Performance Asset Allocation Asset Class Performance

Pre-tax performance helps you review what you've gained and lost over time to see how your money is working for you. [Learn more](#)

Value vs. net contributions

Your account gained **\$1,131,535.01** from Jan 1, 2025 to Nov 18, 2025, excluding net contributions.



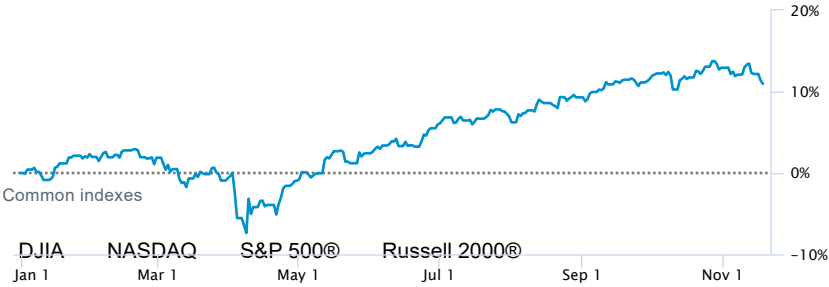
▶ Beginning Value	\$10,223,030.52
▼ Net Contributions (This Period)	+\$173,072.91
Contributions	+\$221,072.91
Withdrawals	-\$48,000.00
▶ Investment Change	+\$1,131,535.01
▶ Ending Value	\$11,527,638.44

[What do these terms mean?](#)

Rate of return

Your account had a cumulative rate of return of **10.97%** from Jan 1, 2025 to Nov 18, 2025.

[How is this calculated?](#)



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Portfolio/Index	Rate of Return
Corporate	10.97%

Show annualized returns ☒

Performance history

Compare performance across different time frames.

i The values presented in this table are trailing, which means they are calculated for select periods of time preceding 11/18/2025.

Value vs. net contributions

Change Factor	Selected Time Frame ^{1,2} [01/01/2025] - [11/18/2025]	Year to Date ²	One Year ^{1,2}	Five Year ^{1,2}	Since Available ¹ [12/31/2010]
▶ Beginning Value	\$10,223,030.52	\$10,223,030.52	\$10,279,768.83	\$6,538,812.57	\$4,893,252.1
▶ Net Contributions (This Period)	+\$173,072.91	+\$173,072.91	+\$193,336.59	+\$1,841,794.55	+\$1,657,937.2
▶ Investment Changes	+\$1,131,535.01	+\$1,131,535.01	+\$1,054,533.02	+\$3,147,031.32	+\$4,976,449.0
▶ Ending Value	\$11,527,638.44	\$11,527,638.44	\$11,527,638.44	\$11,527,638.44	\$11,527,638.4

Rate of return

Account/Index	Selected Time Frame ^{1,2} [01/01/2025] - [11/18/2025]	Year to Date ²	One Year ^{1,2}	Five Year ^{1,2}	Since Available ¹ [12/31/2010]
Corporate	+10.97%	+10.97%	+10.15%	+7.32%	+7.9

[More indices & definitions](#)

¹ Time frames over 1 year display annualized returns.

² The values presented in this table are trailing. This means they calculated for select periods of time preceding 11/18/2025

^A Data for this item is currently unavailable due to a gap in performance data or an error in the calculation(s). Adjusting the selected time frame may provide more data.

^C Account or portfolio was not open or active during the entirety of the time period.

Past performance is no guarantee of future results. The value of investments and the income derived from them can go down as well as up. Future returns are not guaranteed, and a loss of principal may occur. Indexes are unmanaged, do not incur management fees, costs and expenses (or "transaction fees or other related expenses"), and cannot be invested in directly. Indexes are provided for comparison purposes only. Their appropriateness will depend on the nature of the assets held in your account and your risk tolerance. For additional information, please see schwab.com/indexdefinitions. Performance calculations are based on the previous day's closing price. The information contained herein is not intended to be used as the sole basis of investment decisions and is not a recommendation to buy or sell any security. Performance data is based on account values, which are based on security valuations, and some securities, especially thinly traded equities in the OTC market or foreign markets may be valued based on stale prices. To see if this applies to any of your positions, check Summary, Positions, or your latest statement.

Disclosures

(0925-V8JS)

Today's Date: 05:28 PM ET, 11/19/2025

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