NEWS

For Immediate Release

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Syntax and iRebal® from Schwab Advisor Services Team Up to Offer Advanced Personalized Indexing Services

The integration of Syntax Direct and iRebal allows wealth managers to create, rebalance, and trade highly customized indices at scale

NEW YORK, NY (October 21, 2026) – Syntax, a New York-based fintech company pioneering economic data intelligence and next-generation index technologies, today announced a deep technology integration with Schwab Advisor Services™, connecting Syntax Direct℠, Syntax's index development and production engine, directly to iRebal, Schwab's rebalancing platform.

The two platforms provide a complete end-to-end solution that incorporates index creation, index calculation, model management, trading and tax management support to registered investment advisors.

This integration eliminates the manual handoff that has historically separated index design from portfolio implementation. iRebal users can access Syntax Direct through single sign-on to build custom indices, which now flow into iRebal through an API integration. There, the indices serve as model portfolios that can be rebalanced, tax-managed, and personalized down to the individual account and fractional share.

"For financial advisors who want to build and manage personalized portfolios themselves, finding a solution that delivers flexibility without adding complexity hasn't always been easy," said **Patrick Shaddow**, CEO of Syntax. "By pairing Syntax Direct with iRebal, we're keeping advisors firmly in the driver's seat, giving them control over portfolio customization while making personalization more accessible and scalable for their business."

While direct indexing has expanded access to personalized portfolios, it has long relied on a limited pipeline of benchmark indices, placing constraints on customization and putting a cap on scalability. By connecting Syntax Direct's index engine directly to iRebal's rebalancing logic, index changes and custom rules flow natively into account-level workflows, eliminating manual data handling and reconciliation lags.

"Advisors have been looking for an easier way to bring personalized indexing to more of their clients," said **Alison Dooher**, Head of Advisor Services AI and Partner Ecosystem at Schwab

Advisor Services. “Connecting Syntax Direct to iRebal means an advisor can build a custom index and put it to work across client accounts without the manual handoff in between. That’s exactly the kind of partnership we look for: one that saves advisors time and expands what they can offer.”

The index creation function has historically been detached from portfolio management, requiring managers to translate the index into trades, manage cash flows, and apply constraints, one account at a time. This integration closes that gap. The index and the implementation are now the same system.

“The combination of Syntax Direct and iRebal gives independent RIAs complete control over creating personalized portfolios at scale,” said **Bruce Traan**, President of Syntax Indices. “This has important implications in terms of client service, client acquisition, and cost-efficiency.”

To learn more, please click here.

ABOUT SYNTAX

Syntax LLC is a New York-based fintech company pioneering economic data intelligence and next-generation index technologies, operating through two segments: Syntax® Data and Syntax Indices. Using its patented FIS® technology inspired by systems sciences, the Syntax Data segment offers the most comprehensive, granular, and accurate data about the roles and functions of each of the participants in the global economy. Syntax Indices offers customized and proprietary indices, which are foundational for a range of financial products, such as ETFs, UITs, and structured products. The Syntax Direct platform facilitates the creation of customized, institutional quality indices at scale. For more information, visit www.SyntaxData.com.

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