

**2024 FOREIGN PROFIT CORPORATION ANNUAL REPORT**

DOCUMENT# F12000001886

**Entity Name:** SCHWAB WEALTH ADVISORY, INC.

**Current Principal Place of Business:**

211 MAIN STREET  
SAN FRANCISCO, CA 94105

**Current Mailing Address:**

211 MAIN STREET  
SAN FRANCISCO, CA 94105 US

**FEI Number:** 45-3147872

**Certificate of Status Desired:** No

**Name and Address of Current Registered Agent:**

C T CORPORATION SYSTEM  
1200 SOUTH PINE ISLAND ROAD  
PLANTATION, FL 33324 US

*The above named entity submits this statement for the purpose of changing its registered office or registered agent, or both, in the State of Florida.*

**SIGNATURE:**

\_\_\_\_\_  
Electronic Signature of Registered Agent

\_\_\_\_\_  
Date

**Officer/Director Detail :**

Title CORPORATE SECRETARY  
Name TATE, KRISTOPHER  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title CHIEF COMPLIANCE OFFICER  
Name WALDRON, KC  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title ASSISTANT CORPORATE SECRETARY  
Name ALLEN, PETER BLAKE  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title ASSISTANT CORPORATE SECRETARY  
Name KNELSEN, TANIS  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title ASSISTANT CORPORATE SECRETARY  
Name SALVESEN, JEFFREY E.  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title ASSISTANT CORPORATE SECRETARY  
Name TALBOT, PAUL W.  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title MANAGING DIRECTOR  
Name VAN HORN, ANDY  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title MANAGING DIRECTOR  
Name ROBINSON, JENNIFER  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

**Continues on page 2**

*I hereby certify that the information indicated on this report or supplemental report is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am an officer or director of the corporation or the receiver or trustee empowered to execute this report as required by Chapter 607, Florida Statutes; and that my name appears above, or on an attachment with all other like empowered.*

**SIGNATURE:** LAURA GARCIA FLOR

**ASSISTANT CORPORATE SECRETARY 04/05/2024**

\_\_\_\_\_  
Electronic Signature of Signing Officer/Director Detail

\_\_\_\_\_  
Date

**Officer/Director Detail Continued :**

Title MANAGING DIRECTOR  
Name HAMMOND, ROBERT  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title MANAGING DIRECTOR AND CORPORATE CONTROLLER  
Name THACKER, F. AUBREY  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title MANAGING DIRECTOR  
Name BENVENUTO, COURTNEY  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title DIRECTOR  
Name QUINN, WILLIAM F.  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title ASSISTANT CORPORATE SECRETARY  
Name FLOR, LAURA GARCIA  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title MANAGING DIRECTOR AND TREASURER  
Name QUINN, WILLIAM F.  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title CFO  
Name HALL, STEVEN J.  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title ASSISTANT CORPORATE SECRETARY  
Name STRATTON, MICHELLE  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title PRESIDENT  
Name OLSON, BRYAN L.  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105

Title DIRECTOR  
Name NIEDERMEIER, STACY  
Address 211 MAIN STREET  
City-State-Zip: SAN FRANCISCO CA 94105