



0006189218

**STATE OF IDAHO***Office of the secretary of state, Phil McGrane***ANNUAL REPORT**

Idaho Secretary of State  
PO Box 83720  
Boise, ID 83720-0080  
(208) 334-2301  
Filing Fee: \$0.00

*For Office Use Only***-FILED-**

File #: 0006189218

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## Entity Name and Mailing Address:

Entity Name: Betterment Holdings, Inc.  
Foreign Name (name in home jurisdiction): Betterment Holdings, Inc.  
The file number of this entity on the records of the Idaho Secretary of State is: 0005709221  
Address: 450 W 33RD ST  
11TH FLOOR  
NEW YORK, NY 10001

## Entity Details:

Entity Status: Active-Good Standing  
This entity is organized under the laws of: DELAWARE  
If applicable, the old file number of this entity on the records of the Idaho Secretary of State was:

## The registered agent on record is:

Registered Agent: CORPORATION SERVICE COMPANY  
Commercial Registered Agent  
Physical Address  
1305 12TH AVE RD  
NAMPA, ID 83686  
Mailing Address  
1305 12TH AVE RD  
NAMPA, ID 83686








## Agent or Address Change

☐ Select if you are appointing a new agent.

## Corporate Officers and Directors:

Name	Title	Business Address
+ Sarah Levy	President	450 W 33RD ST 11TH FLOOR NEW YORK, NY 10001
+ Peter Lorimer	Treasurer	450 W 33RD ST 11TH FLOOR NEW YORK, NY 10001
+ Gregory Yaecker	Secretary	450 W 33RD ST 11TH FLOOR NEW YORK, NY 10001
+ David Golob	Director	450 W 33RD ST 11TH FLOOR NEW YORK, NY 10001
+ Jon Stein	Director	450 W 33RD ST 11TH FLOOR NEW YORK, NY 10001



 Phillip Riese	Director	450 W 33RD ST 11TH FLOOR NEW YORK, NY 10001
 Sarah Levy	Director	450 W 33RD ST 11TH FLOOR NEW YORK, NY 10001
 Donna Wells	Director	450 W 33RD ST 11TH FLOOR NEW YORK, NY 10001
 Natalie Tydeman	Director	450 W 33RD ST 11TH FLOOR NEW YORK, NY 10001
 Marla Blow	Director	450 W 33RD ST 11TH FLOOR NEW YORK, NY 10001
 Tracy Palandjian	Director	450 W 33RD ST 11TH FLOOR NEW YORK, NY 10001
 Rob Stavis	Director	450 W 33RD ST 11TH FLOOR NEW YORK, NY 10001

The annual report must be signed by an authorized signer of the entity.

Job Title: Secretary

*Gregory Yaecker*

Sign Here

*04/04/2025*

Date