



0005306892

**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 #: 0005306892

Date Filed: 7/6/2023 10:29:00 AM

Entity Name and Mailing Address:

Entity Name: Avantax Planning Partners, Inc.
Foreign Name (name in home jurisdiction): Avantax Planning Partners, Inc.
The file number of this entity on the records of the Idaho Secretary of State is: 0000628601
Address: 3200 OLYMPUS BLVD
STE 100
COPPELL, TX 75019-5889

Entity Details:

Entity Status: Active-Good Standing
This entity is organized under the laws of: IOWA
If applicable, the old file number of this entity on the records of the Idaho Secretary of State was: C210892

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
Louie Rosalez	Vice President	3200 OLYMPUS BLVD, STE 100 DALLAS, TX 75019
Chris Kobes	Vice President	3200 OLYMPUS BLVD, STE 100 DALLAS, TX 75019
Christopher - Rod	Secretary	3200 OLYMPUS BLVD STE 100 DALLAS, TX 75019
Todd Mackay	President	3200 OLYMPUS BLVD, STE 100 DALLAS, TX 75019
Christopher Walters	Director	3200 OLYMPUS BLVD STE 100 DALLAS, TX 75019
Ann Bruder	Director	3200 OLYMPUS BLVD, STE 100 DALLAS, TX 75019
Jason Allen	Vice President	3200 OLYMPUS BLVD, STE 100 COPPELL, TX 75019
Tabitha Bailey	Director	3200 OLYMPUS BLVD, STE 100 COPPELL, TX 75019



☒ Melissa Loner	Secretary	3200 OLYMPUS BLVD, STE 100 COPPELL, TX 75019
☒ Todd Mackay	Director	3200 OLYMPUS BLVD, STE 100 COPPELL, TX 75019

The annual report must be signed by an authorized signer of the entity.
Job Title: Treasurer

<i>Christopher Rod</i>	<i>07/06/2023</i>
Sign Here	Date