

Commonwealth of Kentucky
Michael G. Adams, Secretary of State

PARP

1154989
Michael G. Adams
KY Secretary of State
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Michael G. Adams
Secretary of State
P. O. Box 1150
Frankfort, KY 40602-1150
(502) 564-3490
<http://www.sos.ky.gov>

**Annual Report
Online Filing
For the Year 2024**

ARP

Company: ENVESTNET FINANCIAL TECHNOLOGIES, INC.
Company ID: 1154989
State of origin: Delaware
Formation date: 6/15/2021 12:00:00 AM
Date filed: 5/29/2024 5:09:42 PM
Fee: \$15.00
Principal Office

1000 CHESTERBROOK BOULEVARD, SUITE 250
BERWYN, PA 19312

Registered Agent Name/Address

CT CORPORATION SYSTEM
306 W MAIN STREET
SUITE 512
FRANKFORT, KY 40601

Current Officers

President	James Fox	1000 Chesterbrook Blvd, Suite 250, Berwyn, Pennsylvania 19312
Secretary	Shelly O'Brien	1000 Chesterbrook Boulevard, Suite 250, Berwyn, Pennsylvania 19312
Treasurer	Joshua Warren	One North Wacker, Suite 1925, Chicago, Illinois 60606
Officer	Lori Lundrigan	1801 California St, Floor 23, Denver, Colorado 80202
Officer	Sharon Rosenthal	1000 Chesterbrook Blvd, Suite 250, Berwyn, Pennsylvania 19312
Officer	Barry Cooper	1801 California St., Floor 23, Denver, Colorado 80202
Officer	James Fox	1000 Chesterbrook Blvd, Suite 250, Berwyn, Pennsylvania 19312
Officer	Patrick Marr	One North Wacker, Suite 1925, Chicago, Illinois 60606
Officer	Joshua Warren	One North Wacker, Suite 1925, Chicago, Illinois 60606
Officer	Dana D'Auria	1000 Chesterbrook Blvd, Suite 250, Berwyn, Pennsylvania 19312
Officer	Thomas Sipp	1000 Chesterbrook Blvd, Suite 250, Berwyn, Pennsylvania 19312
Officer	Katie Evans	1000 Chesterbrook Blvd, Suite 250, Berwyn, Pennsylvania 19312
Officer	Debra DeVoe	1000 Chesterbrook Blvd, Suite 250, Berwyn, Pennsylvania 19312

Directors

Director	James Fox	1000 Chesterbrook Blvd, Suite 250, Berwyn, Pennsylvania
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19312

County:	Fayette
Business size:	Small
Business type:	Business Services

Signatures

**Signature
Title**

Adam Steimel
Power of Attorney

