



**State of Rhode Island  
Office of the Secretary of State**

**Fee: \$50.00**

Division Of Business Services  
148 W. River Street  
Providence RI 02904-2615  
(401) 222-3040

**Foreign Business Corporation  
Annual Report**

*Filing Period: February 1 - May 1*

*In accordance with R.I.G.L. 7-1.2-1501(e), each corporation failing or refusing to file its annual report within thirty (30) days after the time prescribed by law (R.I.G.L. 7-1.2-1501(c&d)) is subject to a penalty fee of \$25.00.*

**ANNUAL REPORT YEAR - ENTER THE CURRENT YEAR 2025:** 2025

**1. Corporate ID No.** 001690715

**2. Name of Corporation** MERCER GLOBAL ADVISORS INC.

**3. Street Address Principal Business Office:**

No. and Street: 1200 17TH ST.  
SUITE 500

City or Town: DENVER State: CO Zip: 80202 Country: USA

**4. Business Phone No.**

**5. State of Incorporation**

State: DE

**NAICS CODE**

Enter the six digit NAICS Code that best describes the primary business conducted by the entity. Download the list of codes [here](#). More information on [NAICS](#) can be found online.

523940

**6. Brief Description of the Character of Business Conducted in Rhode Island**

WEALTH MANAGEMENT AND FINANCIAL PLANNING

**7. Names and Addresses of the Officers and Directors:**

**All officers and directors must be listed.**

<b>Title</b>	<b>Individual Name</b> First, Middle, Last, Suffix	<b>Address</b> Address, City or Town, State, Zip Code, Country
PRESIDENT	DANIEL GOURVITCH	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA
PRESIDENT	CHARLES DAVID WELLING	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA
TREASURER	MICHAEL HENRY	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA
SECRETARY	MATHEW ENCINO	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA
CFO	MICHAEL HENRY	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA
CHIEF TALENT AND ADMINISTRATIVE OFFICER	MARTINE LELLIS	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA
CHIEF COMPLIANCE OFFICER	KIM LORENZ	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA
CHIEF MARKETING OFFICER	GARY FOODIM	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA
CHIEF TECHNOLOGY OFFICER	CHRISTINE CATALDO	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA
VICE CHAIRMAN	DAVID BARTON	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA
CHIEF INVESTMENT OFFICER	DONALD CALCAGNI	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA
CHIEF BUSINESS SOLUTIONS OFFICER	KAREN LEE	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA
CHIEF OPERATING OFFICER	LOREN PIERSON	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA
DIRECTOR	CHARLES DAVID WELLING	1200 17TH ST., SUITE 500 DENVER, CO 80202 USA

## 8. Shares Authorized and Issued

Class of Stock	Series of Stock	Par Value Per Share	Total Authorized Shares <i>Number of Shares</i>	Total Issued and Outstanding <i>Num of Shares</i>
CWP		\$0.0100	1,000.00	10

**9. This report must be executed on behalf of the corporation by an authorized representative. If the corporation is in the hands of a receiver or trustee, this report must be executed on behalf of the corporation by the receiver or trustee.**

**Signed this 18 Day of February, 2025 at 4:33:08 PM. This electronic signature of the individual or individuals signing this instrument constitutes the affirmation or acknowledgement of the signatory, under penalties of perjury, that this instrument is that individual's act and deed or the act**

*and deed of the corporation, and that the facts stated herein are true, as of the date of the electronic filing, in compliance with R.I. Gen. Laws § 7-1.2.*

By SHANNON DIAMOND

Signature of Authorized Representative of the Corporation

Form No. 630  
Revised 09/07

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