



**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. 001740371

2. Name of Corporation Betterment Holdings, Inc.

3. Street Address Principal Business Office:

No. and Street: 450 W 33RD ST
11TH FLOOR

City or Town: NEW YORK State: NY Zip: 10001 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.

523900

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

TO ENGAGE IN ANY LAWFUL ACT OR ACTIVITY FOR WHICH CORPORATIONS MAY
BE
ORGANIZED UNDER THE DELAWARE GENERAL CORPORATION LAW

7. Names and Addresses of the Officers and Directors:

All officers and directors must be listed.

Title	Individual Name First, Middle, Last, Suffix	Address Address, City or Town, State, Zip Code, Country
TREASURER	PETER LORIMER	450 W 33RD ST NEW YORK,, NY 10001 USA
PRESIDENT,DIRECTOR	SARAH LEVY	450 W 33RD ST NEW YORK,, NY 10001 USA
SECRETARY,	GREGORY YAECKER	450 W 33RD ST NEW YORK,, NY 10001 USA
DIRECTOR	DAVID GOLOB	450 W 33RD ST NEW YORK,, NY 10001 USA
DIRECTOR	JON STEIN	450 W 33RD ST NEW YORK,, NY 10001 USA
DIRECTOR	PHILLIP RIESE	450 W 33RD ST NEW YORK,, NY 10001 USA
DIRECTOR	DONNA WELLS	450 W 33RD ST NEW YORK,, NY 10001 USA
DIRECTOR	NATALIE NATALIE	450 W 33RD ST,11TH FLOOR NEW YORK,, NY 10001 USA
DIRECTOR	ROB STAVIS	450 W 33RD ST,11TH FLOOR NEW YORK,, NY 10001 USA
DIRECTOR	TRACY PALANDJIAN	450 W 33RD ST,11TH FLOOR NEW YORK,, NY 10001 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		\$0.0010	125,000,000.00	12473810
PWP	D	\$0.0010	7,844,542.00	7844542
PWP	E	\$0.0010	18,436,929.00	18436929
PWP	F	\$0.0010	4,775,715.00	4775701

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 28 Day of April, 2025 at 3:10:30 AM. *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 GREGORY YAECKER
Signature of Authorized Representative of the Corporation

Form No. 630
Revised 09/07

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