Supplement to the Vanguard Personal Advisor Select Brochure

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This brochure supplement provides information about Vanguard Personal Advisor Select® advisory services under Vanguard Advisers, Inc. ("VAI"), the registered investment advisor, that supplements the Vanguard Personal Advisor Select Brochure.

You should have received a copy of the respective brochure. Please contact VAI at the number above if you didn't receive a brochure or if you have any questions about the contents of this supplement.

Additional information about VAI is available on the SEC website at adviserinfo.sec.gov.

Educational background and business experience

Your financial planner from Vanguard Advisers, Inc. ("VAI"), will have several years of experience with investment products in addition to the Vanguard group of mutual funds and is a registered investment advisor representative.

All of VAI's financial planners have completed Vanguard's own financial training program covering: retirement and education investing and analysis, investment and asset allocation principles, VAI's investment advisory methodology, client communications, ethics, and compliance issues. In addition, the financial planners participate in ongoing seminars and training programs conducted both by Vanguard and by independent financial planning organizations.

Many of VAI's financial planners hold the Certified Financial Planner™ (CFP) certification. To obtain the certification, financial planners are required to meet the following four criteria set forth by the Certified Financial Planner Board of Standards:

- The certificant must have a bachelor's degree (or higher) or its equivalent, in any discipline, from an accredited college or university, and successfully complete one of the following additional education requirements: a CFP board-registered program, a challenge status, or a transcript review.
- The certificant must pass the CFP Certification Examination that assesses his or her ability to apply financial planning knowledge, in an integrated format, to financial planning situations.
- The certificant must have three years of full-time relevant personal financial planning experience.
- The certificant must agree to adhere to the Certified Financial Planner Board of Standards' Code of Ethics and Professional Responsibility, Rules of Conduct, and Financial Planning Practice Standards.

VAI has no affiliation with the Certified Financial Planner Board of Standards.

Vanguard Personal Advisor Select financial planners

In addition to name, year of birth, and formal education after high school, the current position and business experience for at least the preceding five years is included below for each financial planner.

Penelope Karp Abad, CFP® (1985)
B.A. Government, Connecticut College (2007)
Financial planner, Vanguard (2019–present); investment consultant, Vanguard (2019)

John Kyle Abella, CFP® (1992)
B.S. Marketing and Finance, West Chester University (2016)
Financial planner, Vanguard (2019–present)

Selena E. Abraham, CFP® (1976)
B.S. Health care management, Belmont Abbey College (1998)
Financial planner, Vanguard (2019–present)

Curtis Martin Ackerly, CFP® (1994)
B.S. Finance and Risk management and insurance, University of South Carolina (2016)
Financial planner, Vanguard (2021–present); sales consultant, Vanguard (2020–2021); retirement specialist, Vanguard (2019–2020)

Isaac Martin Acosta Montenegro, CFP® (1989)
B.S.B.A. Finance, The University of North Carolina at Charlotte (2013)
B.S. Economics, The University of North Carolina at Charlotte (2013)
Financial planner, Vanguard (2019–present)

James R. Acuna (1979)
B.A. Political science, The State University of New York at Albany (2002)
M.S. Secondary education, College of Saint Rose (2004)
Manager, Vanguard (2019–present)

Gregory J. Adams, CFP® (1976)
B.A. Business, Belmont Abbey College (1998)
Financial planner, Vanguard (2019–present)

Ryan M. Adams, CFP® (1977)
B.S. Business administration, Arizona State University (2003)
Financial planner, Vanguard (2019–present)

Ryan Matthew Adler (1981)
B.A. Liberal studies, California State University, East Bay (2003)
Financial planner, Vanguard (2022–present); client development professional, JPMorgan Chase (2021–2022); customer relationship manager, Fidelity (2020–2021); financial advisor, Ameriprise Financial (2019–2020); specialist, Apple (2019); recruiter, Keller Williams (2019)

Stephen S. Ajemian, CFP® (1976)
B.A. Business administration, University of Delaware (1999)
M.B.A., Saint Joseph's University (2011)
Manager, Vanguard (2019–present)

Jonathan Edward Akley, CFP® (1983)
B.S. Business management, Arizona State University (2015)
Financial planner, Vanguard (2021–present); client consultant, Vanguard (2019–2021)

Bethany Albertson (1994)
B.S.B.A. Finance, Northern Arizona University (2016)
Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021)

Ryan Albright (1999)
B.S. Personal finance, University of Wisconsin-Madison (2022)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); financial planning intern, Jacobson and Schmitt Advisors (2021–2022); financial planning intern, WEA Member Benefits (2021–2022); teaching assistant, University of Wisconsin-Madison School of Human Ecology (2020–2022); student desk staff, University of Wisconsin Housing Desk Service (2020–2021); student laborer, Wisconsin Public Service (2019–2020); seasonal produce clerk, Festival Foods (2019–2020)

Stanislav Alemaskin, CFP® (1983)
A.S. Marketing, Delaware County Community College (2013)
B.S. Marketing, West Chester University of Pennsylvania (2017)
M.B.A. Finance, Wilmington University (2021)
Financial planner, Vanguard (2021–present); banker III, Truist Financial (2020–2021); partner, Scavenger Cycles LLC (2019–2020)
Outside activities: Mr. Alemaskin is an owner of rental property. Vanguard Advisers, Inc., has no affiliation with the rental property, and Mr. Alemaskin's responsibilities do not conflict with his position at Vanguard.

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B.S., SUNY Binghamton (2001)
Financial planner, Vanguard (2019–present)

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B.S. Finance and banking, Appalachian State University (2013)
Manager, Vanguard (2022–present); financial planner, Vanguard (2019–2022)

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Financial planner, Vanguard (2019–present)

Caroline Elise Allen, CFP® (1984)
B.B.A. Finance, Grand Valley State University (2008)
Financial planner, Vanguard (2019–present)

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B.I.S. Interdisciplinary studies/Economics and Business, Arizona State University (2006)
Financial planner, Vanguard (2019–present)

Samantha Angella Allen, CFP® (1989)
B.S. Accounting, Wingate University (2018)
Financial planner, Vanguard (2020–present); store clerk, The Reddoor (2019–present); client consultant, Vanguard (2019–2020); client service specialist, Vanguard (2019)

William Allen (1984)
B.A. Accounting, Arizona State University (2022)
Financial planner, Vanguard (2023–present); advisor support representative, Vanguard (2021–2023); financial services consultant, TIAA (2021); transportation specialist, Uber (2019–2021); owner, Photoshoot 24/7 (2019)

Jayson Lee Allsbrook, CFP® (1996)
B.S. Finance, Virginia Tech (2018)
Financial planner, Vanguard (2019–present); financial advisor development program, Vanguard (2019)

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B.S. Finance, University of Central Florida (2009)
M.B.A., Florida Southern College (2012)
Financial planner, Vanguard (2022–present); senior fintech product owner, Edward Jones (2022); digital advisor product owner, Vanguard (2020–2022); financial planner, Vanguard (2019–2020)

Alfred Joseph Amato III, CFP® (1998)
B.B.A. Financial planning and Risk management and insurance, Temple University (2021)
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); advice intern, Randstad (2020); administrative individual insurance and wealth management support intern, Leon L. Levy & Associates (2019–2020); general agent, Northwestern Mutual (2019)

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B.A. International economics, Saint Francis College (2002)
Manager, Vanguard (2020–present); supervisor, Vanguard (2019–2020)

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B.S. Business management with a certificate in International business, Arizona State University (2008)
Financial planner, Vanguard (2019–present)

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B.A. Psychology, University of Delaware (2006)
M.B.A., University of Delaware (2010)
M.S. International business, Grenoble Ecole de Management (2011)
Financial planner, Vanguard (2023–present); director, financial advice, Stash (2021–2022); financial planner, SoFi (2019–2021)

Camisha Anderson (1997)
B.S. Finance, The University of Tennessee, Chattanooga (2019)
Financial planner, Vanguard (2023–present); client associate, Vanguard (2021–2023); brokerage service representative, Wells Fargo (2020); brokerage service representative, Associate Staffing (2019–2020); sales associate, Target (2019)

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B.S. Business management, University of Arizona (2012)
Financial planner, Vanguard (2019–present)

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B.S. Business administration, Susquehanna University (1998)
Manager, Vanguard (2021–present); sales manager, Vanguard (2019–2021)

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B.B.A. Finance, The University of Iowa (2022)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); investment operations extended intern, Principal Global Investors (2021); café team member, Lifetime Athletic (2019)

Claudiu Mihai Antonie (1999)
B.S. Finance, College of Charleston (2021)
Financial planner, Vanguard (2022–present); advance to financial planning associate, Vanguard (2021–2022); financial advisor intern, Family Asset Management (2019); tutor, College of Charleston (2019)

Timothy Joseph Apple (1994)
B.A. Finance, Virginia Tech (2017)
Financial planner, Vanguard (2022–present); client representative, Vanguard (2021–2022); client case representative, Vanguard (2020–2021); client relationship associate, Vanguard (2019–2020); agent, William C. Moore Financial Services (2019)

Brian D. Applestein, CFP® (1967)
B.A. Political economy, Muhlenberg College (1990)
Financial planner, Vanguard (2019–present)

Matthew Laanan Aquino (1985)
B.Ed. General education, California State University, Northridge (2008)
Financial planner, Vanguard (2022–present); investment counselor, Fisher Investments (2021–2022); financial consultant academy trainee, Charles Schwab (2019–2021); business development manager, Profile by Sanford (2019)

McKenna Nicole Arensen, CFP® (1994)
B.S. Business administration, Arizona Christian University (2016)
Financial planner, Vanguard (2020–present); workforce management analyst, Vanguard (2019–2020)

Jessica Arias, CFP® (1983)
B.A. Business administration, New Mexico State University (2005)
M.B.A., New Mexico State University (2006)
Financial planner, Vanguard (2019–present)

Grant Wesley Armstrong Jr., CFP® (1961)
B.A. International studies, The University of North Carolina at Chapel Hill (1985)
M.R.P., Economics and community development, The University of North Carolina at Chapel Hill (1991)
Financial planner, Vanguard (2022–present); personal financial counselor, Zeiders Enterprises, Inc. (2019–2022)

Raymond Arroyo, CFP® (1977)
B.S. Communication, Illinois State University (2000)
Financial planner, Vanguard (2022–present); financial advisor, PFG Advisors (2021–2022); financial advisor, Prudential (2020–2021); financial specialist, Allstate Financial Services (2019–2020)

Phillip Asuelo (1999)
B.A. Financial planning, Arizona State University (2022)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); college financial representative, Northwestern Mutual (2021); sales associate, Target (2020); cashier, Dairy Queen (2019)

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B.S. Political science, Arizona State University (2017)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); orders client representative, Vanguard (2021–2022); client relationship associate, Vanguard (2020–2021); research and policy director, Anita for Arizona (2019–2020); elections and annexation aide, City of Phoenix (2019); steering committee member, Indivisible Project (2019)

Tracy Gelber Auerbach (1966)
B.A. French and francophone studies, University of Pennsylvania (2019)
Financial planner, Vanguard (2021–present); Vanguard Return to Work intern, Randstad (2021); vice president, Adondo Corporation (2019)

Julie Scott Aument, CFP® (1982)
B.A. Communications, The University of North Carolina at Chapel Hill (2005)
Financial planner, Vanguard (2019–present)

Jonathan Axtell, CFP® (1970)
B.A. Business administration, Belmont Abbey College (1993)
M.B.A., Appalachian State University (1994)
Financial planner, Vanguard (2019–present)

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B.B.A. Finance, University of Houston (2021)
B.B.A. Marketing, University of Houston (2021)
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); financial advisor assistant, Dearborn & Creggs (2021–2022); Bauer Honors mentor, University of Houston – Bauer Honors Program (2020–2021); student worker, University of Houston – Rockwell Career Center (2020–2021); financial representative intern, Northwestern Mutual (2020)

Erica Baczkowski, CFP® (1991)
B.S. Marketing, West Chester University (2013)
M.B.A Management, West Chester University (2018)
Financial planner, Vanguard (2023–present); wealth management associate, Vanguard (2019–2023)

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B.A. Political science, Oberlin College and Conservatory (1983)
M.P.A., Columbia University (1985)
M.B.A., University of Pennsylvania (1989)
Financial planner, Vanguard (2022–present); Vanguard Return to Work intern, Randstad (2022); retirement specialist, Merrill Lynch (2019)

Beecher Bailey, CFP® (1958)
B.S. Communications, The University of Tennessee, Knoxville (1980)
Financial planner, Vanguard (2019–present)

Jason Robert Bailey, CFP® (1982)
B.S. Finance, The University of North Carolina at Charlotte (2005)
Financial planner, Vanguard (2019–present)

Katie Baillargeon (1989)
A.A.S., Whatcom Community College (2008)
A.S. Health science laboratory technology, The George Washington University (2010)
B.A.B.A. Finance, University of Washington Tacoma (2016)
M.S. Personal financial planning, Texas Tech University (2021)
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); associate, Kohl's (2021); financial analyst, The Geneva Foundation (2019–2021)

Nicholas Paul Baker (1998)
B.S. Business administration, Winthrop University (2020)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); retirement specialist, Vanguard (2020–2022); intern, OneMain Financial (2019–2020)

Richard Baker (1961)
University of Maryland (1979–1983, non–degree)
Financial planner, Vanguard (2021–present); mid-Atlantic sales manager, Superio Brand (2019–2020); financial advisor, 1847 Financial (2019–2020)

Charles C. Ball, CFP® (1983)
B.S. Political science, Arizona State University (2006)
Financial planner, Vanguard (2019–present)

Aditya Banerji, CFP® (1997)
B.A. Economics., University of South Carolina (2019)
Financial planner, Vanguard (2023–present); sales consultant, Vanguard (2022–2023); retirement specialist, Vanguard (2020–2022); client relationship associate, Vanguard (2020); communications intern, Better Business Bureau (2019)

Gabriel Palmieri Barakat (1999)
B.S. Finance and Information technology management, Seton Hall University (2021)
Financial planner, Vanguard (2022–present); advance to financial planning associate, Vanguard (2021–2022); delivery driver, Panera Bread (2019–2020); financial intern, Thrive Wealth Management (2019)

Julieanne Barar, CFP® (1980)
B.S. Business administration, emphasis in Finance, California State University, Dominguez Hills (2005)
Financial planner, Vanguard (2019–present)

Garrett Barkley, CFP® (1990)
B.S.B.A. Business economics and Marketing, University of South Carolina (2013)
Financial planner, Vanguard (2022–present); technology product owner, Infosys (2020–2022); business technology product administrator, Vanguard (2019–2020)

Dylan Barrera, CFP® (1989)
B.A. Economics, University of Nevada Las Vegas (2013)
Financial planner, Vanguard (2022–present); financial advisor, Link Financial Advisory (2020–2022); financial advisor, Capstone Partners Insurance and Investment Services (2020); registered investment advisor, PFS Investments, Inc. (2019–2020)
Outside activities: Mr. Barrera is president of CTENOW, LLC. Vanguard Advisers, Inc., has no affiliation with CTENOW, LLC, and Mr. Barrera's responsibilities do not conflict with his position at Vanguard.

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B.S. Business management, Shippensburg University (1993)
Financial planner, Vanguard (2021–present); financial advisor, Prudential Financial (2019–2021)

Amanda Brooke Bateman, CFP® (1988)
B.S. Business management, Liberty University (2010)
Financial planner, Vanguard (2023–present); financial advisor, Dentist Advisors (2021–2023); financial planner, Vanguard (2021); relationship manager, Vanguard (2019–2021)

Elizabeth Battaglia, CFP® (1991)
B.S. Business administration, The University of Vermont (2013)
Financial planner, Vanguard (2019–present)

Jonathan W. Battiste, CFP® (1983)
B.S. Psychology, Saint Joseph's University (2005)
Financial planner, Vanguard (2019–present)

Walter Russell Bay, CFP® (1989)
B.S. Sports marketing and management, Indiana University (2012)
Financial planner, Vanguard (2019–present)

Thomas Beatie, CFP® (1974)
B.A. Health sciences, University of Hawaii (1996)
Financial planner, Vanguard (2022–present); client representative, Vanguard (2019–2022)

Davis Beazer (1997)
B.S. Personal financial planning, Utah Valley University (2022)
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); customer support agent, TaxHawk, Inc. (2022); customer advocacy, Alder Security (2021); remote summer intern, Randstad (2021); summer intern, Vision Financial Advisors, LLC (2020); customer service agent, Alder Security (2019–2020)

Michael Zachary Bechard, CFP® (1989)
B.S. Psychology, University of Kentucky (2011)
M.A. Clinical psychology, West Chester University (2013)
Financial planner, Vanguard (2022–present); portfolio specialist, Fidelity Investments (2020–2022); client management representative, Fidelity Investments (2020); managed account support specialist, Fidelity Investments (2019–2020); private client group representative, Fidelity Investments (2019)

Todd D. Bechtel, CFP® (1972)
B.S. Business administration, West Chester University (1995)
Financial planner, Vanguard (2019–present)

Jeff Beck, CFP® (1989)
B.A. Economics, The University of Texas at Austin (2011)
Financial planner, Vanguard (2022–present); senior financial advisor, Personal Capital (2021–2022); financial advisor, Personal Capital (2020–2021); financial consultant, E*TRADE (2019)

Mary Beth Becker (1963)
B.S. Criminal justice, The University of Scranton (1988)
J.D., Ohio Northern University (1994)
Manager, Vanguard (2019–present)

Stephen Becker (1988)
B.S. Finance, Portland State University (2011)
Financial planner, Vanguard (2022–present); consultant, Syndicate Tactical Solutions (2021–2022); disability insurance specialist, Sedgwick (2019–2021); day trader, self-employed (2019–2022)

Douglas Allen Beckner, CFP® (1994)
B.A. Finance and Economics, Wofford College (2017)
Financial planner, Vanguard (2019–present); operations service administrator, Vanguard (2019); investment professional, Vanguard (2019)

Brandon Beers (1975)
University of Oregon (1996–1997, non–degree)
Utah State University (1999, non–degree)
Financial planner, Vanguard (2022–present); client case consultant, Vanguard (2019–2022); inheritance consultant, Vanguard (2019)

Britta Beesley (2000)
B.S. Personal financial planning, Kansas State University (2022)
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); strategy and portfolio management intern, INTRUST Bank (2021); intern, Raymond James Financial Services (2020–2021); teacher's assistant, Kansas State University (2019–2022)

Jeremy A. Beil, CFP® (1979)
B.S. Finance, The Pennsylvania State University (2002)
M.B.A., Saint Joseph's University (2010)
Financial planner, Vanguard (2019–present)

Jeremy Belingon (2000)
B.B.A. Finance and Accounting, Villanova University (2022)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); basketball summer camp coach, West Chicago Community High School (2021); team member associate, Follett (2019–2020)

Austin Bell, CFP® (1993)
B.S. Finance, University of Louisville (2016)
Financial planner, Vanguard (2021–present); financial advisor, LPL Financial DBA First Harrison Financial Services (2019–2020)

Travis Bell, CFP® (1991)
B.A. Geography, University of South Carolina (2013)
Manager, Vanguard (2019–present)

Carlos Fernando Benitez (1996)
B.A. Business technology with a certificate in International business, Arizona State University (2018)
Financial planner, Vanguard (2021–present); financial advisor, Renaissance Financial (2019–2021)

Christopher L. Bennett, CFP® (1974)
B.S. Business management, Arizona State University (2000)
Financial planner, Vanguard (2019–present)

Joseph Bennett, CFP® (1987)
B.B.A. Finance, University of Houston (2016)
Financial planner, Vanguard (2023–present); wealth management advisor, Northwestern Mutual (2019–2022)

Eric Taft Benson, CFP® (1979)
A.T.P. General business, Chandler Gilbert Community College (2001)
B.S. Marketing, Arizona State University (2003)
Financial planner, Vanguard (2019–present)

James Kent Benson, CFP® (1959)
B.A. Economics and German, The University of North Carolina at Charlotte (1982)
Financial planner, Vanguard (2019–present)

Sary Benzvi, CFP® (1956)
B.S. Statistics and Political science, University of Haifa (1982)
M.S. Computer science, California State University, Northridge (1994)
M.B.A. International business, California State University, Dominguez Hills (1997)
Ph.D., Business administration, Trident University International (2021)
Financial planner, Vanguard (2022–present); vice president – financial consultant, Charles Schwab (2020–2022); wealth manager, USAA (2019–2020); financial advisor, USAA (2019)

Matthew James Berger (1999)
B.S. Finance, The Pennsylvania State University (2021)
Financial planner, Vanguard (2022–present); advance to financial planning associate, Vanguard (2021–2022); deli clerk, Dutchway (2019–2021); direct shopper, Giant (2020–2021), financial advising intern, uFinancial Group (2020–2021); operations intern, Speedway LLC (2019)

John Bergsma, CFP® (1985)
B.S. Business administration, Arizona State University (2009)
Financial planner, Vanguard (2020–present); client case representative, Vanguard (2019–2020); client administrator, Vanguard (2019)

Oliver Roddey Bernhardt, CFP® (1997)
B.S. International business, The University of North Carolina at Charlotte (2020)
B.A. German, The University of North Carolina at Charlotte (2020)
Financial planner, Vanguard (2022–present); investment specialist, Vanguard (2021–2022); client service representative, Vanguard (2020–2021); server, Noble Food and Pursuits (2019–2021)

Michael Beroza, CFP® (1984)
B.A. History, Long Island University (2007)
Financial planner, Vanguard (2019–present); vice president, Foresters Financial (2019)

Michael Bersano, CFP® (1977)
B.S. International marketing, Arizona State University (2000)
Financial planner, Vanguard (2019–present)

Anthony M. Berumen, CFP® (1986)
B.B.A., Northern Arizona University (2012)
Financial planner, Vanguard (2019–present)

Zachary Bezella, CFP® (1998)
B.S. Finance, Arizona State University (2020)
Financial planner, Vanguard (2022–present); territory consultant, Nationwide Financial (2020–2022); data analyst and research associate, N.J. Leven and Associates (2019–2021); college financial representative, Northwestern Mutual (2019)

Kimberly Bielous, CFP® (1993)
B.A. International relations, Saint Joseph's University (2016)
Financial planner, Vanguard (2019–present)

Evan Daniel Bigler, CFP® (1988)
B.A. Business finance, Saint Joseph's University (2010)
Financial planner, Vanguard (2020–present); financial consultant, Fidelity Investments (2019–2020)

Melissa A. Bilczewski, CFP® (1973)
B.S. Finance, Arizona State University (1995)
M.B.A. Management, Western International University (2001)
Manager, Vanguard (2019–present); department head, Vanguard (2019)

Aubrey Billittier, CFP® (1998)
B.S. Economics, Edinboro University (2019)
B.S. Business administration, Edinboro University (2019)
Manager, Vanguard (2023–present): Financial planner, Vanguard (2021–2023); financial advisor development program, Vanguard (2020–2021); substitute teacher, Lancaster Central School District (2020); summer associate, FJY Financial LLC (2019)

Donald William Binckes (1991)
B.S. Business administration, King's College (2013)
Financial planner, Vanguard (2020–present); client solutions specialist, Vanguard (2019–2020); client service specialist, Vanguard (2019)

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B.S. Business administration, Elizabethtown College (2014)
Financial planner, Vanguard (2019–present)

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A.A. Music, Central Bible College (1999)
B.A. Theology, Central Bible College (1999)
Financial planner, Vanguard (2022–present); department head, Vanguard (2019–2022)

David Blackstone (1964)
B.A. Economics and Psychology, Northwestern University (1986)
M.B.A., University of Chicago (2000)
J.D., Temple University (2006)
Financial planner, Vanguard (2021–present); financial consultant, self-employed (2019–2020)

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B.S. Economics, Ursinus College (2016)
Financial planner, Vanguard (2019–present)

Logan C. Blough, CFP® (1990)
B.S. Business administration, University of South Carolina (2012)
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B.S. Finance, University of South Carolina (2012)
Financial planner, Vanguard (2023–present); financial planner, Facet Wealth, Inc. (2021–2022); paraplanner, John K. McGill & Company, Inc. (2019–2021); planning associate, Modera Wealth Management (2019)

Brandon Boekel, CFP® (1991)
B.S. Finance, The Pennsylvania State University (2013)
Financial planner, Vanguard (2019–present)

Madison Boggs, CFP® (1997)
B.S. Financial management, Clemson University (2019)
Financial planner, Vanguard (2020–present); financial advisor development program, Vanguard (2019–2020); on-call branch office assistant, Edward Jones (2019)

Andrew Donald Bolland (1992)
B.A. Economics, Washington College (2015)
Financial planner, Vanguard (2021–present); financial advisor, Mutual of Omaha Investor Services, Inc. (2020–2021); registered representative, Mutual of Omaha Investor Services, Inc. (2019–2020)
Outside activities: Mr. Bolland was a self-employed insurance agent and still receives residual income from his business. Mr. Bolland does not offer new policies to clients. Vanguard Advisers, Inc., has no affiliation with the insurance agency, and Mr. Bolland's residual income does not conflict with his position at Vanguard.

Laura Boldt, CFP® (1976)
B.S. Finance, Arizona State University (1998)
Financial planner, Vanguard (2019–present)

Thomas Russell Thomasovich Bonifield (2000)
B.S. Finance, Arizona State University (2022)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); retention specialist, State Farm (2020–2022); accounting assistant, Arizona State University (2020); associate, Amazon Logistics (2019); intern, AWM Capital (2019)

Dwayne Bordelon (1961)
Financial planner, Vanguard (2022–present); financial advisor, Edward Jones (2019–2021)

Austin Born (1996)
B.S. Finance, Saint Joseph's University (2018)
Financial planner, Vanguard (2023–present); client representative, Vanguard (2021–2023); client case representative, Vanguard (2019–2021); client relationship associate, Vanguard (2019); client relationship associate, Randstad (2019); financial processor, Randstad (2019)

Derek Randall Bostian, CFP® (1983)
B.S.B.A Finance, risk management and insurance, The University of North Carolina at Charlotte (2008)
Financial planner, Vanguard (2023–present); principal, Two Waters Wealth Management (2019–2023)

William Andrew Bowling, CFP® (1969)
B.S. Political science, United States Naval Academy (1991)
Financial planner, Vanguard (2022–present); financial consultant, Charles Schwab (2020–2022); wealth manager, USAA (2019–2020)

Anthony Boxler, CFP® (1987)
B.S. Finance and Food marketing, Saint Joseph's University (2009)
Financial planner, Vanguard (2019–present)

Ikeem Boyd (1994)
B.S. Finance and Business management, West Chester University (2017)
Financial planner, Vanguard (2022–present); private client banker, JPMorgan Chase (2019–2022); financial advisor trainee, Merrill Lynch (2019)

Michelle Boyer, CFP® (1960)
B.A. Psychology, George Mason University (1982)
Financial planner, Vanguard (2019–present)

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B.A. Broadcasting, Arizona State University (1996)
Financial planner, Vanguard (2019–present)

Ryan Jeremy Brackett, CFP® (1991)
B.S. Finance, West Chester University (2015)
Financial planner, Vanguard (2019–present)

Comischell Bradley-Rodriguez, CFP® (1965)
B.A. Music, Asbury University (1988)
Manager, Vanguard (2023–present); financial planner, Vanguard (2021–2023); financial advisor, CUSO Financial Services at Ohio University Credit Union (2019–2021); licensed client service associate, United Brokerage Services (2019); financial services professional, New York Life Insurance Company (2019); registered representative, NYLIFE Securities, LLC (2019)
Outside activities: Ms. Bradley-Rodriguez is an owner of rental property. Vanguard Advisers, Inc., has no affiliation with the rental property, and Ms. Bradley-Rodriguez's responsibilities do not conflict with her position at Vanguard.

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B.A. Psychology, Stockton University (formerly The Richard Stockton College of New Jersey) (2000)
Financial planner, Vanguard (2019–present)

John Patrick Braun (1998)
B.A. Political science, Gettysburg College (2020)
Financial planner, Vanguard (2022–present); client relationship associate, Vanguard (2020–2022); finance intern, BLB&B Advisors, LLC. (2019); clubhouse valet, Commonwealth National Country Club (2019); prospect clinic instructor, Gettysburg College (2019)

Mark Daniel Breiling, CFP® (1981)
A.B. Business, Yavapai College (2003)
B.S.B.A Finance, Northern Arizona University (2008)
M.B.A Financial planning, California Lutheran University (2016)
Financial planner, Vanguard (2021–present); sales specialist, Vanguard (2019–2021); assigned representative, Vanguard (2019)

Joyce Breinlinger (1971)
B.S. Accounting, University of Delaware (1993)
M.B.A., Loyola University Maryland (2006)
Financial planner, Vanguard (2022–present); client case representative, Vanguard (2021–2022); business manager, Steven Breinlinger State Farm Agency (2019–2020)

Kimberly Ann Brenes (1972)
B.A. Political science, Arizona State University (1994)
M.I.M. International business management, Thunderbird School of Global Management (1996)
M.L.I.S. Library and information science, (2012)
Financial planner, Vanguard (2021–present); freelance business & resume writer, Talent Inc. (2020)

William Powell Brisley (1984)
B.A. Political science and Peace, war, and defense, The University of North Carolina at Chapel Hill (2006)
Manager, Vanguard (2019–present)

Michael Jo Bristoll (1988)
B.A. Business, Arizona State University (2019)
Manager, Vanguard (2021–present); financial planner, Vanguard (2020–2021); client solutions specialist, Vanguard (2019–2020); assigned representative, Vanguard (2019)

Jonathan Keith Britt, CFP® (1992)
B.A. Psychology, Coker College (2014)
E.J.D., Purdue University Global (2018)
Financial planner, Vanguard (2022–present); branch examiner, J.W. Cole (2022); senior financial planner, Facet Wealth (2021–2022); financial advisor, DiPaolo Financial Group (2021); investment counselor, Fisher Investments (2020–2021); relationship manager, Fidelity (2019–2020)

James R. Broadnix, CFP® (1980)
B.S. Finance, Florida Atlantic University (2002)
Financial planner, Vanguard (2021–present); relationship executive, Vanguard (2019–2021)

Harrison Bromley, CFP® (1989)
B.S. Finance, West Chester University (2014)
Financial planner, Vanguard (2022–present); financial advisor, Wealthcare Advisory Partners LLC d/b/a Secure Planning Group LLC (2019–2022); registered representative, LPL Financial LLC (2019–2022); financial advisor, Miller's Insurance Company (2019)

Ryan Bronowicz, CFP® (1979)
B.S. Management, Saint Bonaventure University (2006)
M.B.A. Finance and Accounting, Saint Bonaventure University (2007)
Financial planner, Vanguard (2019–present)

Daniel A. Brooks, CFP® (1975)
B.B.A. Finance, The University of Iowa (1998)
Financial planner, Vanguard (2019–present)

Jason Brooks, CFP® (1978)
B.A. Criminal justice and Psychology, The University of North Carolina at Charlotte (2000)
M.B.A., University of South Carolina (2018)
Manager, Vanguard (2019–present)

Beren Lee Brown, CFP® (1988)
B.S. Exercise science, Brigham Young University (2013)
Financial planner, Vanguard (2021–present); investment consultant, Vanguard (2020–2021); client relationship specialist, Vanguard (2019–2020)

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B.S. Business administration, Rowan University (2006)
Financial planner, Vanguard (2019–present)

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B.A. Political science, North Carolina State University (2003)
M.P.A., Strayer University (2009)
M.B.A., Pfeiffer University (2014)
Financial planner, Vanguard (2019–present); operations service administrator, Vanguard (2019); retail inheritance consultant, Vanguard (2019)

Alec Christopher Bruington (1995)
B.S. Business administration, University of Missouri (2017)
Financial planner, Vanguard (2022–present); advisor support representative, Vanguard (2021–2022); portfolio implementation associate, Vanguard (2019–2021); brokerage investment professional, Vanguard (2019)

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B.S. Finance and Management, University of South Carolina (2015)
Financial planner, Vanguard (2019–present)

Thomas Buckman, CFP® (1991)
B.B.A. Finance and Marketing, Temple University (2010)
Financial planner, Vanguard (2021–present); relationship manager, Vanguard (2019–2021)

Martin Francis Bucko (1962)
B.S. Accounting, Villanova University (1984)
Financial planner, Vanguard (2022–present); financial advisor, E*TRADE (2019–2021)

Javier Buitron Jr. (1993)
Financial planner, Vanguard (2022–present); client service associate, JPMorgan Chase (2021–2022); relationship banker, Citizens Bank (2019–2021); personal banker, WSFS Bank (2019)

Clayton Burke, CFP® (1980)
B.S. Business management, Northern Arizona University (2006)
M.B.A. Finance, Grand Canyon University (2009)
Financial planner, Vanguard (2019–present)

Stephen J. Burley Jr., CFP® (1984)
B.A. Mathematics, Rowan University (2008)
Financial planner, Vanguard (2019–present)

James David Burney, CFP® (1973)
B.S. Biology, Furman University (1995)
M.A. Youth and family ministries, Denver Seminary (2001)
M.A. Counseling, Denver Seminary (2005)
Financial planner, Vanguard (2019–present)

Dawn Marie Buscher, CFP® (1964)
B.B.A. Finance, The University of Iowa (1988)
M.B.A., University of Dallas (2000)
Financial planner, Vanguard (2022–present); planning consultant, Fidelity Investments (2020–2022); senior relationship manager, Fidelity Investments (2019–2020)

Kyle Busher (1998)
B.A. Business, organizations, and society, Franklin & Marshall College (2020)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); operations analyst, SEI (2020–2021); intern, Morgan Stanley (2019); busser, Stoner Grille (2019); driver, Lyft (2019); delivery driver, NAPA Auto Parts (2019)

Paul D. Cable, CFP® (1966)
B.A. Finance, University of Nevada (1996)
Financial planner, Vanguard (2019–present)

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B.A. Psychology, Immaculata University (2013)
Financial planner, Vanguard (2019–present)

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B.S. Business administration, Western International University (2012)
Financial planner, Vanguard (2019–present)

Simon Cain (1982)
B.S. Global business and Management, Arizona State University (2008)
M.S. Financial management, Golden State University (2015)
Manager, Vanguard (2021–present); academic training leader, Edward Jones (2019–2021)

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B.S. Finance, The Pennsylvania State University (2005)
M.B.A. Finance and Strategic management, Villanova University (2012)
Financial planner, Vanguard (2019–present)

Matthew Callander, CFP® (1995)
B.S. Financial planning, William Paterson University (2017)
Financial planner, Vanguard (2019–present)

Ed Campagna, CFP® (1986)
B.S. Secondary social studies education, Millersville University of Pennsylvania (2013)
Financial planner, Vanguard (2019–present)

Colin Canavan, CFP® (1977)
B.A. Economics, The University of Arizona (2000)
M.B.A., University of Phoenix (2004)
M.S. Financial planning, College for Financial Planning (2015)
Financial planner, Vanguard (2019–present)

Richard Travis Carden, CFP® (1996)
B.B.A. Trust and wealth management, Campbell University (2018)
M.B.A., Appalachian State University (2020)
Financial planner, Vanguard (2022–present); senior wealth management associate, Greenleaf Trust (2021–2022); retirement consultant, Empower Retirement (2021); financial advisor, Wells Fargo (2019–2021)

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B.S. Finance, Northern Arizona University (2022)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); barista, Dutch Bros Coffee (2019–2022)

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B.S. Marketing, California State University, Long Beach (1991)
Financial planner, Vanguard (2022–present); advisor coach, Matson Money (2019–2021); private client banker, JPMorgan Chase (2019)

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B.S. Economics, Brigham Young University (2014)
Financial planner, Vanguard (2019–present)

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B.S. Finance, Winthrop University (2017)
Financial planner, Vanguard (2022–present); financial advisor, Founders Federal Credit Union (2019–2022)

Wednesday Carsillo, CFP® (1968)
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Financial planner, Vanguard (2019–present)

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B.S.B.A. Finance, Drexel University (2012)
Financial planner, Vanguard (2019–present)

Jennifer Nicole Carter, CFP® (1981)
B.A. Interdisciplinary studies, The University of Texas at Dallas (2010)
Financial planner, Vanguard (2022–present); financial consultant, E*TRADE Securities (2020–2022); financial consultant, Fidelity Investments (2019–2020); investment consultant, Fisher Investments (2019)

Marcus Andre Carter, CFP® (1968)
B.S. Business administration, Wagner College (1991)
Financial planner, Vanguard (2021–present); transition manager, Vanguard (2019–2021)

Michael Carter, CFP® (1974)
B.S.B.A. Hospitality management and Computer information services, Appalachian State University (2000)
M.B.A. Finance concentration, New York Institute of Technology (2008)
Financial planner, Vanguard (2019–present)

Matthew Joseph Cascio, CFP® (1991)
B.A. Public health, University of South Carolina (2013)
Financial planner, Vanguard (2019–present)

Michael Joseph Casey (1993)
B.A. Business sustainability, Arizona State University (2016)
Financial planner, Vanguard (2022–present); client representative, Vanguard (2021–2022); investment professional, Vanguard (2019–2021); brokerage investment professional, Vanguard (2019)

Rex O. Casey, CFP® (1971)
B.A. English, Xavier University of Louisiana (1993)
M.P.A., Indiana University (2007)
Financial planner, Vanguard (2022–present); investment consultant, Charles Schwab (2021–2022); sales specialist, Vanguard (2020–2021); client service specialist, Vanguard (2019–2020); investment professional, Vanguard (2019)

Erich Cassidy, CFP® (1981)
B.S. Business management, Thomas Edison State University (2015)
Financial planner, Vanguard (2022–present); senior financial planner, EP Wealth Advisors (2020–2022); financial planner, MassMutual (2019–2020)

Kevin Raul Castaneda, CFP® (1999)
B.S. Economics, Texas A&M University (2021)
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); sales operation intern, Reynolds & Reynolds (2020); peer advisor, Money Education Center (2019–2021); sales floor associate, Big Lots (2019)

Evan de Castro (2000)
B.S. Finance, Virginia Tech (2022)
B.S. Accounting, Virginia Tech (2022)
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); Vanguard contractor, Randstad (2021); intern, Variant Private Wealth (2020–2021); intern, BoodleAi (2019–2020); associate, Office Depot (2019)

Cody Catron (1990)
B.S. Marketing, Iowa State University (2013)
Financial planner, Vanguard (2022–present); investment servicing senior specialist, JPMorgan Securities (2019–2022); mortgage servicing specialist, Wells Fargo (2019)

Nick Catsoules (1971)
B.S. Business management, Arizona State University (1994)
M.B.A., Saint Edward's University (2003)
Manager, Vanguard (2019–present)

George Breckinridge Cauffman (1991)
B.S. Accounting and business administration, Washington and Lee University (2014)
Financial planner, Vanguard (2021–present); business development consultant, Citrine Power (2020–2021); financial analyst, CBRE (2019–2020)

Joseph Caufield, CFP® (1981)
B.A. Communications, The Pennsylvania State University (2004)
M.B.A., Drexel University (2016)
Manager, Vanguard (2019–present)

Marc Everett Cavalier, CFP® (1992)
B.A. International business and management, Dickinson College (2014)
Financial planner, Vanguard (2019–present)

George A. Centeno, CFP® (1982)
B.S. Personal financial planning, Texas Tech University (2005)
M.B.A., University of Nebraska–Lincoln (2010)
Manager, Vanguard (2019–present)

Nikhil Chablani, CFP® (1987)
B.A. Economics, University of Arizona (2011)
Financial planner, Vanguard (2019–present)

Trent Chabot (1991)
B.A. English literature, The University of North Carolina at Charlotte (2013)
M.A. English literature, Winthrop University (2016)
Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021); produce clerk, Lowes Foods (2020)

Jeremy Chambers, CFP® (1983)
B.S. Business administration, The University of North Carolina at Greensboro (2007)
Financial planner, Vanguard (2020–present); financial consultant, Charles Schwab (2019–2020)

Jessica Lynn Cecile Chancey, CFP® (1989)
B.S. Finance, Arizona State University (2011)
Financial planner, Vanguard (2019–present)

Praveen Chand, CFP® (1969)
B.S. Accounting, University of Delhi, India (1990)
M.B.A. Finance, Philadelphia University (1993)
Financial planner, Vanguard (2019–present)

Flint Chandler (1968)
Financial planner, Vanguard (2021–present); financial advisor, AIG/VALIC (2019–2021); financial advisor, Merrill Lynch (2019)

Daniel Micah Chang, CFP® (1985)
B.S.B.A., The University of North Carolina at Chapel Hill (2007)
Financial planner, Vanguard (2019–present)

Jack Armand Chapel (1998)
B.S. Finance, The University of Arizona (2020)
Financial planner, Vanguard (2022–present); financial advisor, Equitable Advisors (2020–2022); intern, Camelback Wealth Consultants (2019)

Christopher John Charte, CFP® (1993)
B.S. Business administration, Liberty University (2015)
Financial planner, Vanguard (2022–present); financial advisor, Selective Wealth Management (2020–2022); financial planner, Vanguard (2019–2020)

Leslie Chatty, CFP® (1967)
B.A. Psychology, Albright College (1990)
Financial planner, Vanguard (2019–present)

Robert Joseph Cherry (1994)
B.S. Finance and Economics, Grand Canyon University (2021)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); personal trainer, Fit Republic (2020); fitness advisor, In Shape (2019)
Outside activities: Mr. Cherry is a host for Airbnb. Vanguard Advisers, Inc., has no affiliation with Airbnb, and Mr. Cherry's responsibilities do not conflict with his position at Vanguard.

Chris Christian III, CFP® (1968)
B.S.B.A. Business, University of Louisville (1992)
M.B.A. Finance and Accounting, Marquette University (2004)
Financial planner, Vanguard (2019–present)

Matthew Daniel Ciaglia, CFP® (1973)
B.S.B.A. Business management, The University of North Carolina at Charlotte (1996)
Financial planner, Vanguard (2021–present); independent insurance agent/owner, Looking Forward Financial, LLC (2020–2021); insurance specialist, Truist Financial (2019–2020)

Caterina Mary Ciarlante (1964)
Saint Joseph's University (1988, non–degree)
Manager, Vanguard (2021–present); supervisor, Vanguard (2019–2021); assigned representative, Vanguard (2019)

John Ciavarelli (1988)
B.S. Business administration, Drexel University (2012)
Financial planner, Vanguard (2021–present); retirement specialist, Vanguard (2020–2021); client service specialist, Vanguard (2019–2020); client service associate, WSFS Wealth Investments (2019); driver, Uber Technologies, Inc. (2019)

John Cinalli, CFP® (1968)
B.S. Business administration, Drexel University (1991)
Financial planner, Vanguard (2019–present)

Stephen Civille, CFP® (1964)
B.S. Business management, Western Governors University (2017)
Manager, Vanguard (2019–present); supervisor, Vanguard (2019)

Catherine M. Clark, CFP® (1965)
B.A. Interdisciplinary studies, Governors State University (2012)
M.S. Finance, DePaul University (2016)
M.B.A. Strategic leadership, University of Illinois (2019)
Financial planner, Vanguard (2021–present); executive wealth strategist, Blue Lotus Strategies (2019–2021); financial consultant, Charles Schwab, Inc. (2019)

Steven Michael Clarke, CFP® (1986)
B.S. Personal financial planning, University of Missouri (2010)
Financial planner, Vanguard (2019–present); wealth management advisor, TIAA (2019)

Matt Clarkson, CFP® (1984)
B.S. Retailing and consumer sciences, The University of Arizona (2007)
Financial planner, Vanguard (2019–present); investment administrator, Vanguard (2019)

Jonathan Cleborne (1980)
B.A. Government, University of Virginia (2003)
M.B.A., Dartmouth College (2010)
Principal, Vanguard (2019–present)

Wilson Scott Clines, CFP® (1978)
B.S.B.A. Finance, Northern Arizona University (2003)
Financial planner, Vanguard (2019–present)

J. Austin Closs, Jr. (1985)
B.S. Criminal justice, Tarleton State University (2008)
M.S. Finance, Johns Hopkins University (2022)
Financial planner, Vanguard (2023–present); Vanguard Return to Work intern, Randstad (2022–2023); special agent, Federal Bureau of Investigation (2019–2020)

Tom Coakley, CFP® (1979)
B.S. Finance, The University of Vermont (2001)
Financial planner, Vanguard (2019–present)

Juliana Coates (1985)
B.S. French and Biology, The State University of New York at Albany (2007)
M.B.A., The State University of New York at Albany (2017)
Financial planner, Vanguard (2022–present); financial analyst, Goldman Sachs (2019–2022); member service leader, SEFCU (2019)
Outside activities: Ms. Coates is an owner of rental property. Vanguard Advisers, Inc., has no affiliation with the rental property, and Ms. Coates' responsibilities do not conflict with her position at Vanguard.

Jason Matthew Cockerham, CFP® (1977)
B.S. Finance, The Pennsylvania State University (1999)
Financial planner, Vanguard (2019–present)

Timothy Cody (1974)
B.S. Economics, University of Wisconsin–Madison (1997)
Manager, Vanguard (2021–present); manager, Ally Invest (2020–2021); financial solutions advisor, Merrill Lynch (2020); branch manager, TD Ameritrade (2019)

Benjamin D. Cohen, CFP® (1976)
B.A. Political science, West Virginia University (1998)
Financial planner, Vanguard (2019–present)

Eli Cohen, CFP® (1978)
B.A. English, The George Washington University (2001)
Financial planner, Vanguard (2021–present); financial consultant, Fisher Investments (2019–2021)

James Nicholas Colao, CFP® (1989)
B.S.B.A. Marketing, Duquesne University (2012)
Financial planner, Vanguard (2022–present); financial consultant, Fidelity Investments (2020–2022); investment consultant, Fidelity Investments (2019–2020)

Dante Pasquale Colarusso (1997)
B.S.B.A. Finance, University of Pittsburgh (2020)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); performance analyst, Bank of New York Mellon (2020–2022); associate, Costco Wholesale (2020); resident assistant, University of Pittsburgh (2019–2020); associate, Target (2019–2020); wealth management trust tax intern, PricewaterhouseCoopers (2019)

Andy Coleman, CFP® (1974)
B.A. Psychology, The University of North Carolina at Chapel Hill (1996)
Financial planner, Vanguard (2019–present)

Michael Collegeman, CFP® (1991)
B.S. Finance and Business economics, Indiana University (2013)
Financial planner, Vanguard (2021–present); internal auditor, AIG, Inc. (2019–2021); associate financial advisor, LifeWorth Financial (2019)

John P. Collins (1956)
B.S. Economics, Rockford University (1980)
Financial planner, Vanguard (2020–present); national key accounts director, Oberweis Asset Management (2019)

Shane Collins, CFP® (1978)
B.S. Business administration, Truman State University (2001)
Financial planner, Vanguard (2019–present)

Brian Concannon (1988)
B.A. Finance, La Salle University (2010)
M.B.A., London Business School (2017)
Principal, Vanguard (2023–present); department head, Vanguard (2019–2023)

Carole Connolly, CFP® (1957)
B.A. French and Psychology, Ohio Wesleyan University (1979)
Financial planner, Vanguard (2019–present)
Outside activities: Ms. Connolly is an owner of rental property. Vanguard Advisers, Inc., has no affiliation with the rental property, and Ms. Connolly's responsibilities do not conflict with her position at Vanguard. Ms. Connolly is the executrix for an estate. Vanguard Advisers, Inc., has no affiliation with the estate, and Ms. Connolly's responsibilities do not conflict with her position at Vanguard.

Kara Connolly (2000)
B.S. Finance, The University of Arizona (2021)
Financial planner, Vanguard (2023–present); specialty flex associate, Vanguard (2022–2023); operations intern, Charles Schwab (2021); management trainee intern, Enterprise Rent-a-Car (2020–2021); server, Enclave Senior Living at Anthem (2020); server and shift lead, Sauce Pizza and Wine (2019–2020)

Malachi Jake Conyers III, CFP® (1975)
B.S. Finance, University of South Carolina (2002)
Financial planner, Vanguard (2019–present)

Easton Mark Cook (1989)
B.S. Business, University of Phoenix (2014)
Financial planner, Vanguard (2019–present)

Jamie Ryan Cook, CFP® (1981)
B.S. Business administration, Elizabethtown College (2004)
Financial planner, Vanguard (2019–present)

Jude Samuel Cooke, CFP® (1987)
B.S. Management, United States Military Academy (2010)
M.B.A., Oklahoma State University (2015)
Financial planner, Vanguard (2021–present); regional director of business development, Lockwood Advisors (2019–2021)

Frank J Cordova Jr., CFP® (1995)
B.B.A. Finance and Management, New Mexico State University (2018)
Financial planner, Vanguard (2022–present); client representative, Vanguard (2020–2022); manager, MCF Construction, Inc. (2019)

Charles B. Cornner, CFP® (1971)
B.M. Vocal arts, California State University, Northridge (1994)
M.M. Music education, Arizona State University (1997)
Financial planner, Vanguard (2019–present)
Outside activities: Mr. Cornner is a choir director at Cross of Christ Lutheran Church. Vanguard Advisers, Inc., has no affiliation with Cross of Christ Lutheran Church, and Mr. Cornner's responsibilities do not conflict with his position at Vanguard.

Kristen Cortez (1985)
B.S. Tourism and hospitality management, Temple University (2008)
M.B.A, The Pennsylvania State University (2010)
Manager, Vanguard (2023–present); chief of staff, Vanguard (2022–2023); supervisor, Vanguard (2021–2022); client service representative, Vanguard (2019–2021)

Timothy Ray Cosby Jr., CFP® (1999)
A.S. Business administration, J. Sargeant Reynolds Community College (2017)
B.S. Finance, Virginia Tech (2021)
B.S. Management, Virginia Tech (2021)
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); advice intern, Randstad (2020); marketing intern, iScholars (2019–2020); college financial representative, Northwestern Mutual (2019); men's merchandise associate, Marshalls (2019)

Zachary Andrew Costagliola, CFP® (1993)
B.S.B.A. Business administration, High Point University (2016)
Financial planner, Vanguard (2019–present)

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B.A. Economics, University of South Carolina (2021)
M.A. Economics, University of South Carolina (2022)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); financial analyst intern, G3 Wealth Advisors (2021–2022); supervisor, Cape Resorts (2019–2020)

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B.B.A., Roanoke College (2022)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); federal and state tax consultant, Sonoco (2021); student assistant, Roanoke College (2019)

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B.S. Consumer science, The University of Alabama (2018)
M.S. Financial planning, The University of Alabama (2018)
Financial planner, Vanguard (2019–present); financial advisor development program, Vanguard (2019)

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B.S. Personal financial planning, Texas Tech University (2013)
M.S. Personal financial planning, Texas Tech University (2013)
Financial planner, Vanguard (2022–present); senior financial planner, RGT Wealth Advisors (2019–2022); financial planner, RGT Wealth Advisors (2019)

Conner Paul Covington (1998)
B.S. Agricultural economics, Texas A&M University (2020)
Financial planner, Vanguard (2022–present); advisor support group representative, Vanguard (2021–2022); glazier technician, American Glass Company (2021); student worker, Texas A&M University (2020); sales intern, John Hancock Investment Management (2020); cashier, Rudy's Bar-B-Q (2019)

Jonathan Admiral Covington (1986)
B.S. Aerospace and Mechanical engineering, Oklahoma State University (2010)
Financial planner, Vanguard (2022–present); financial advisor, 49 Financial (2019–2022); financial analyst, 49 Financial (2019–2021); construction contractor, The Chatham Collective (2019)

Robert Taylor Cox, CFP® (1993)
B.S. Technical management, DeVry University (2016)
Financial planner, Vanguard (2021–present); investment operations specialist, Ronald Blue Trust (2019–2021)

Jacqueline V. Coyne, CFP® (1991)
B.A. Economics, Rutgers State University of New Brunswick (2013)
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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2020–present); client case representative, Vanguard (2019–2020); inheritance consultant, Vanguard (2019) bartender, Akahana Asian Bistro (2019)

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B.A. Telecommunications, Baylor University (2005)
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Financial planner, Vanguard (2020–present); corrections and reversals supervisor, SEI Investments (2019–2020)

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B.A. Criminal justice, Monmouth University (2018)
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Sydney DiNatale (2000)
B.S. Finance, The University of Alabama (2021)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); sales intern, Adams-Martin Allstate (2021–2022); loan officer assistant, First Federal Bank (2020–2021); bank teller, Eastern Bank (2019–2021); faculty scholar, The University of Alabama (2019–2020); server, Lookout Rooftop Bar (2021); server, Side by Side Kitchen & Cocktails (2021)

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B.S. Finance, Temple University (2018)
B.S. Financial planning, Temple University (2018)
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B.S. Accounting, The Pennsylvania State University Erie – The Behrend College (1997)
M.S. Taxation and financial planning, Widener University (2008)
Financial planner, Vanguard (2021–present); financial consultant, TIAA (2019–2020)

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B.S. Finance, Grand Canyon University (2020)
Financial planner, Vanguard (2021–present); financial advisor, Equitable Advisors (2020–2021)

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B.S. Business management, University of North Carolina Asheville (2021)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); house sitter, self-employed (2022); analyst, JacksonKate Trading, LLC. (2020–2022); financial consultant, House of Brandstracts, Inc. (2021–2022); dishwasher and prep cook, Avenue M (2019–2020); mentor, McRorie-Williams (2019)

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B.S. Mechanical engineering technology, University of Dayton (1989)
Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2019–present); account transition specialist, Vanguard (2019)

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B.S. Business administration, Messiah College (1997)
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B.S. Finance, Virginia Tech (2022)
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); remote mutual fund co-op, Edward Jones (2021); musician on streaming and online services, self-employed (2020–2021); contact driver for DoorDash, self-employed (2020–2021); barista, EspressOasis (2019–2020); associate, Taste Unlimited (2019); intern, Trinity Church (2019)

Heath Dowell, CFP® (1981)
B.B.A Finance, The University of Texas at Arlington (2007)
Manager, Vanguard (2021–present); branch manager, TD Ameritrade (2019–2021)

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Financial planner, Vanguard (2019–present)

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B.S. Finance and Entrepreneurial management, University of South Carolina (2019)
Manager, Vanguard (2022–present); financial planner, Vanguard (2020–2022); investment consultant, Vanguard (2019–2020); financial services intern, Carolinas Wealth Management (2019); marketing intern and office administrator, Southern Woodcraft & Design (2019)

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Financial planner, Vanguard (2019–present)

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B.S. Financial counseling and planning, Purdue University (2022)
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B.S. Business administration, Bemidji State University (2013)
Manager, Vanguard (2020–present); supervisor, Vanguard (2019–2020)

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Disciplinary information: In 2015, the Pennsylvania Department of Banking issued a Consent Agreement and Order which found Erwin Gant and Gant Private Financial Management ("GPFM"), a sole proprietorship for which Mr. Gant acted as president and owner, to have violated the Pennsylvania Securities Act by failing to register as an investment adviser in Pennsylvania during the period from January 1, 2013, until April 24, 2013. GPFM engaged in the business of advising others for compensation, however, was not registered and was not exempt from registration with the State as an investment adviser. Mr. Gant and GPFM were ordered to pay an administrative assessment in the amount of $5,296.64. See FINRA's BrokerCheck for more information.

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Financial planner, Vanguard (2019–present); homemaker, personal residence (2019)

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M.B.A. Finance, Marywood University (2014)
Financial planner, Vanguard (2022–present); client care representative, Vanguard (2021–2022); portfolio implementation associate, Vanguard (2019–2021); brokerage investment professional, Vanguard (2019)

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B.S. Pharmaceutical marketing, Saint Joseph's University (2003)
Financial planner, Vanguard (2019–present)

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B.S. Business administration, North Carolina State University (2011)
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Financial planner, Vanguard (2019–present)

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B.S. Interdisciplinary studies, The University of Texas at El Paso (2010)
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Financial planner, Vanguard (2021–present); client consultant, Vanguard (2019–2021); client service specialist, Vanguard (2019)

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Financial planner, Vanguard (2022–present); relationship and portfolio manager, Glenmede Trust Company (2019–2021)

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B.B.A. Financial Services and planning, Baylor University (2002)
Financial planner, Vanguard (2021–present); investment services manager, GuideStone Financial Resources (2019–2021)

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Financial planner, Vanguard (2022–present); workplace planning consultant, Fidelity Investments (2021–2022); private banker, JPMorgan Chase (2021); financial advisor, Equitable Advisors (2019–2021)

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B.S. Finance, University of Pennsylvania (1987)
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Manager, Vanguard (2023–present); financial planner, Vanguard (2021–2023); client service representative, Vanguard (2019–2021); participant services representative, Vanguard (2019)

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M.B.A. Finance, College of Charleston (2011)
Financial planner, Vanguard (2019–present)

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B.S. Business information technology, Virginia Tech (2003)
Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2020–present); client experience specialist, Vanguard (2019–2020)

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Financial planner, Vanguard (2022–present); vice president–financial consultant, Fidelity Investments (2019–2021); financial consultant, Fidelity Investments (2019)

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Manager, Vanguard (2023–present); supervisor, Vanguard (2020–2023); financial planner, Vanguard (2019–2020); investment professional, Vanguard (2019)

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B.S. Financial planning, William Paterson University (2018)
Manager, Vanguard (2022–present); financial planner, Vanguard (2019–2022); financial advisor development program, Vanguard (2019)

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B.S.B.A. Finance, Waynesburg University (2004)
Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2022–present); vice president, financial consultant, Charles Schwab (2020–2022); financial consultant, Fidelity Investments (2019–2020)

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B.S. Psychology, Saint Joseph's University (1999)
M.B.A., Saint Joseph's University (2006)
Financial planner, Vanguard (2019–present)

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B.S. Business administration, Ramapo College (2001)
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Outside activities: Ms. McBride is an owner of rental property. Vanguard Advisers, Inc., has no affiliation with the rental property, and Ms. McBride's responsibilities do not conflict with her position at Vanguard.

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B.A. Economics, Rutgers University (1994)
Financial planner, Vanguard (2021–present); Vanguard Return to Work intern, Randstad (2021)

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B.S. Finance, Northeastern University (1987)
M.B.A. Finance, The Pennsylvania State University (1992)
Financial planner, Vanguard (2021–present); senior investment advisor, PNC Wealth Management (2019–2020)

Casey Jean McCallister (1999)
B.S. Finance, Lehigh University (2021)
Financial planner, Vanguard (2022–present); advisor support representative, Vanguard (2021–2022); customer sales associate, The Preppy Palm (2019–2020)

Kelly James McCarrel (1980)
B.S. Hotel restaurant management, Northern Arizona University (2002)
Manager, Vanguard (2019–present)

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B.S.B.A. Finance and Marketing, University of Pittsburgh (2007)
M.B.A. General management, Drexel University (2019)
Manager, Vanguard (2019–present); business project manager, Vanguard (2019)

Ryan McCarty, CFP® (1991)
A.S., McHenry County College (2011)
B.S. Finance, Illinois State University (2013)
Financial planner, Vanguard (2019–present)

Keegan McCarville (1998)
A.A. General studies and Arts, South Mountain Community College (2018)
B.S. Management, Northeastern University (2021)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); portfolio manager, Stearns Bank N.A. (2022); player, Milwaukee Brewers Baseball Club (2019–2021); cashier, Superpumper (2020)

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B.A. Liberal studies, University of Hawaii (1993)
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Financial planner, Vanguard (2019–present)

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B.A. Industrial relations, The University of North Carolina at Chapel Hill (1994)
Financial planner, Vanguard (2019–present)

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B.A. Interdisciplinary studies, Belmont Abbey College (2022)
Financial planner, Vanguard (2022–present); founder, McConnell Financial (2020–2022); director of advisor development, Quantum (2019–2020)

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B.S.B.A. Finance, University of Central Florida (2013)
Financial planner, Vanguard (2021–present); private client advisor, Schwab Private Client Investment Advisory (2019–2021)

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Financial planner, Vanguard (2019–present)

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B.S. Education, Northeastern State University (1988)
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Manager, Vanguard (2019–present)

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B.A. English, Regis College (1985)
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Principal, Vanguard (2019–present)

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B.A. Psychology, West Chester University (2012)
Financial planner, Vanguard (2019–present)

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B.B.A., Temple University (1980)
M.B.A. Finance, Drexel University (1986)
Financial planner, Vanguard (2019–present)

James McDonald (1997)
B.S. Corporate finance, Bloomsburg University (2019)
Financial planner, Vanguard (2023–present); portfolio implementation associate, Vanguard (2021–2023); personal relationship banker, Truist Bank (2020–2021); client supervisor, Wayne Moving and Storage (2019–2020)

Caleigh Elizabeth McDonough (2000)
B.S. Finance, Virginia Tech (2022)
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); financial planning scribe, CrossPoint Wealth Partners (2021–2022); contract driver, GrubHub (2021–2022); contract driver, Door Dash (2021–2022); capital markets intern, Freddie Mac (2021); single-family intern, Freddie Mac (2020–2021); waitress, Macado's (2019); financial planning assistant, Voya Financial (2019); referee, United States Soccer Federation (2019)

Kyle P. McEvoy, CFP® (1984)
B.A. Music industry, The State University of New York at Oneonta (2006)
Financial planner, Vanguard (2019–present)

Sharon E. McFadden, CFP® (1960)
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Financial planner, Vanguard (2019–present); investment analyst, Vanguard (2019)

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B.S., Rutgers University (2008)
M.B.A., Villanova University (2016)
Financial planner, Vanguard (2019–present)

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B.S. Finance, The Pennsylvania State University (2005)
Manager, Vanguard (2021–present); fixed income trader, Vanguard (2019–2021)

Connor McGuire, CFP® (1997)
B.S. Business management, West Chester University (2019)
B.S. Marketing, West Chester University (2019)
Financial planner, Vanguard (2021–present); client case representative, Vanguard (2020–2021); change of ownership specialist, Vanguard (2020); client relationship associate, Vanguard (2019–2020)

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B.A. Economics, University of South Carolina (1994)
Financial planner, Vanguard (2019–present)

Thomas McKinney (1968)
B.A. Audio engineering, California State University, Dominguez Hills (1991)
Financial planner, Vanguard (2021–present); financial advisor, Prudential Advisors (2021); financial consultant, TIAA (2019–2020)

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B.A. Religious studies, Santa Clara University (2003)
Financial planner, Vanguard (2019–present)

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B.S. Financial planning, University of Delaware (2018)
Financial planner, Vanguard (2019–present); financial advisor development program, Vanguard (2019)

Tyler McMahon, CFP® (1997)
B.B.A. Finance and Financial Planning, Temple University (2019)
Financial planner, Vanguard (2020–present); financial advisor development program, Vanguard (2019–2020); president and director of communication, Temple University Financial Planning Association (2019)

Tracy Lynn McMacken, CFP® (1977)
B.A. Communication, Arizona State University (2015)
B.A. Sociology, Arizona State University (2015)
Financial planner, Vanguard (2022–present); advisor support representative, Vanguard (2021–2022); portfolio implementation associate, Vanguard (2019–2021); operations specialist, Vanguard (2019)

Michael C. McManus, CFP® (1960)
B.S. Finance, Saint John's University (1982)
M.S. Finance, Baruch College (2000)
Financial planner, Vanguard (2021–present); portfolio manager, Rockland Trust Company (2019–2021)

Madison McNamara (2000)
B.S. Financial planning and wealth management, University of Delaware (2021)
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); summer intern, Maillie LLP (2021); micro intern, Creative Financial Group (2021); purchasing department intern, Universal Machine Company (2019–2020)

Christopher McNulty, CFP® (1995)
B.S. Accounting, Saint Joseph's University (2017)
Financial planner, Vanguard (2020–present); client consultant, Vanguard (2019–2020); investment professional, Vanguard (2019)

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B.S. Financial management, Clemson University (2005)
Manager, Vanguard (2019–present)

Laurie Beth Meade, CFP® (1974)
B.A. Philosophy, University of South Carolina (2000)
Financial planner, Vanguard (2019–present); retirement specialist, Vanguard (2019)

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Financial planner, Vanguard (2022–present); wealth manager, USAA (2019–2022)
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Tarjani Mehta, CFP® (1999)
B.B.A. Financial planning, Temple University (2021)
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); program organizational and outreach intern, Time Out (2020); finance assistant intern, Edelman Wealth Management Group, Inc. (2020); sales associate, Forever 21 (2019–2020); crew member, Chipotle (2019)

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B.S. Finance, real estate, and law, California State Polytechnic University, Pomona (2014)
Financial planner, Vanguard (2021–present); client representative, Vanguard (2020–2021); retirement specialist, Vanguard (2019–2020)

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B.A. Psychology, University of Delaware (2003)
Financial planner, Vanguard (2022–present); financial advisor, Mallard Financial Partners (2019–2022)

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Houston Community College (Fall 2016, Spring 2017, Summer 2019, and Summer 2020, non-degree)
B.S. Agricultural economics, Texas A&M University (2022)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); student assistant, Texas A&M University-College Station (2022)

Filippo Menegon (1999)
B.S. Business studies, Stockton University (2021)
Financial planner, Vanguard (2023–present); client relationship associate, Vanguard (2022–2023); financial analyst, Bally's Corporation (2021–2022)
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B.A. History, University of Florida (2001)
M.S. Financial management, University of Maryland Global Campus (2012)
Financial planner, Vanguard (2022–present); financial planner, Suncoast Credit Union (2022); driver helper, UPS (2022); financial planner, Fisher Investments (2021–2022); financial planner, USAA (2019–2021)

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B.A. Political science, The State University of New York at Potsdam (1998)
Financial planner, Vanguard (2019–present)

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B.S. Accounting, Juniata College (1989)
Financial planner, Vanguard (2019–present)

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B.S. Investment finance, University of South Carolina (2013)
Financial planner, Vanguard (2020–present); investment associate, Vanguard (2019–2020)

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B.B.A Marketing and Management, University of Wisconsin–Madison (1992)
M.B.A, University of Saint Thomas – Minnesota (2007)
Financial planner, Vanguard (2021–present); vice president – wealth management, U.S. Bank (2019–2021)

Jason Miehle, CFP® (1986)
B.S. Financial management, Clemson University (2008)
Manager, Vanguard (2019–present)

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B.S. Personal finance, University of Wisconsin-Madison (2020)
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); delivery driver, DoorDash (2020); financial representative intern, Northwestern Mutual (2019–2020); owner, AB Window Washing (2019)

Calvin Montgomery Mihal (1999)
B.B.A. Finance, University of Kentucky (2022)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); community assistant/leasing agent, The Wyatt Apartments (2019–2022); finance and accounting summer intern, Winston Products, LLC (2021); leasing agent, The Hub on Campus Lexington (2019)

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B.A. Communication studies, Arizona State University (2006)
Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2019–present); Vanguard Return to Work intern, Randstad (2019)

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A.A. General studies, Kellogg Community College (2014)
B.B.A. Finance, Southern Adventist University (2017)
Financial planner, Vanguard (2021–present); change of ownership specialist, Vanguard (2020–2021); brokerage investment professional, Vanguard (2019–2020); director of development, Wisconsin Academy (2019)

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Financial planner, Vanguard (2019–present)

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B.A. Economics, Colorado State University (2005)
Financial planner, Vanguard (2022–present); financial education specialist, MBO Partners (2021–2022); financial planner, Robin Miller Financial, LLC (2020–2021); financial planner and client relationship manager, Jeff Huff & Associates (2019–2021); investment services relationship manager, Westgate Capital Consultants (2019)

Ryan Miller, CFP® (1979)
B.S. Finance and Management, University of South Carolina (2002)
Financial planner, Vanguard (2019–present)

Janar Milligan (1999)
B.S. Financial planning, University of Illinois Urbana-Champaign (2022)
Financial planner, Vanguard (2023–present); financial advisor development program, Vanguard (2022–2023); delivery driver, GrubHub (2020–2022); caller, University of Illinois (2019–2022); sales associate, DTLR (2019–2020); dining hall cashier, University of Illinois (2019)

Khalif Mink (1994)
Community College of Philadelphia (2021–2022, non–degree)
Financial planner, Vanguard (2022–present); private client banker, JPMorgan Securities LLC (2021–2022); relationship banker, JPMorgan Chase (2020–2021); enumerator, U.S. Census Bureau (2020); associate banker, JPMorgan Chase (2019–2020); sales representative, State Farm (2019); branch sales representative, Police and Fire Federal Credit Union (2019)

Alberto Miranda (1994)
B.A. Economics, The University of Texas at Austin (2016)
Financial planner, Vanguard (2021–present); financial solutions consultant, PNC Bank (2020–2021); personal banker, Wells Fargo (2019–2020); relationship banker, JPMorgan Chase (2019)

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A.A., New Mexico Junior College (2018)
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B.S. Personal financial planning, Texas Tech University (2021)
Financial planner, Vanguard (2022–present); financial advisor development program, Vanguard (2021–2022); leasing agent, The Grove Lubbock Apartments (2020–2021); meat deli clerk, Albertsons (2019–2020)

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B.S. Finance, Fairfield University (2002)
Financial planner, Vanguard (2019–present)

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B.A. Economics, The University of New Mexico (2004)
Financial planner, Vanguard (2021–present); financial consultant, BBVA (2019–2020); wealth management advisor, TIAA (2019)

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M.S. Telecommunication engineering, Telecom SudParis, France (2006)
M.B.A. Strategy and Finance, New York University (2015)
Manager, Vanguard (2019–present)

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M.Ed. Curriculum and instruction, University of Houston (1997)
M.B.A., Baylor University (2014)
Financial planner, Vanguard (2021–present); financial advisor, Personal Capital (2020–2021); financial planner, Mercer Advisors | Kanaly Trust (2019–2020)

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B.A. Biology, Ottawa University (2011)
B.A. Health Care Management, Ottawa University (2011)
M.B.A., Grand Canyon University (2018)
Manager, Vanguard (2019–present)

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B.S. Criminal justice, The University of North Carolina at Charlotte (2006)
B.S. Psychology, The University of North Carolina at Charlotte (2006)
M.S. Criminal justice and criminology, The University of North Carolina at Charlotte (2014)
Financial planner, Vanguard (2019–present)

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B.S. Finance, The University of North Carolina at Charlotte (2004)
Financial planner, Vanguard (2019–present)

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B.S. Business management, Western Colorado University (2003)
Manager, Vanguard (2022–present); sales consultant, Vanguard (2020–2022); sales associate, Vanguard (2019–2020); client service specialist, Vanguard (2019)

Alexis Montoya (1999)
B.S. Economics, University of Illinois Urbana-Champaign (2021)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); intern, Valeo Financial Advisors (2021); sales associate, Calvin Klein (2019–2021); sales associate, Converse (2019)

Spencer Moody (1966)
B.A. International relations, Brigham Young University (1992)
M.B.A. International business, Thunderbird School of Global Management (1994)
Financial planner, Vanguard (2021–present); financial representative, Northwestern Mutual (2020–2021); field representative, Quintero & Partners (2019–2020); field representative, Bankers Life (2019); consultant/account lead, MediaCom Latin America (2019)

Derek Moon, CFP® (1976)
B.A. Business administration, Goshen College (1998)
Financial planner, Vanguard (2019–present)

Brett Oliver Moore (2000)
B.A. Economics and Hispanic and Latin American languages, literatures, and linguistics, University of Florida (2022)
Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); retail lending product management intern, PNC Financial Services Group (2021); workshop manufacturer, Caldwell's Windoware (2021)

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A.A. Communication studies, College of the Canyons (2014)
B.A. Communication studies, California State University, Long Beach (2016)
Financial planner, Vanguard (2020–present); investment consultant, Vanguard (2019–2020); assigned representative, Vanguard (2019)

George Morakis, CFP® (1964)
B.S. Electrical engineering, NYU Polytechnic School of Engineering (1987)
J.D. Law, New York Law School (1991)
M.B.A. Finance, New York University (2001)
Financial planner, Vanguard (2021–present); investment counselor, Fisher Investments (2020–2021); financial consultant, JP Morgan Chase (2020); private client advisor, JPMorgan Chase (2019–2020)

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B.S. Communications, Arizona State University (2018)
Financial planner, Vanguard (2019–present); wealth manager, USAA (2019)

Ryan Moran, CFP® (1997)
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Financial planner, Vanguard (2020–present); financial advisor development program, Vanguard (2019–2020)

Shari Morelli (1968)
B.A. English, The State University of New York at Albany (1990)
M.Ed. Elementary education, New York University (1998)
Financial planner, Vanguard (2022–present); Vanguard Return to Work intern, Randstad (2022); owner and founder, Mainline Tutoring Collaborative (2020–2021); interim director, Main Line Reform Temple Early Childhood Education (2019–2020); owner and founder, Backtalk Designs (2019)

William T. (Tom) Moren, CFP® (1960)
B.S. Accounting, Arizona State University (1992)
M.S. Financial planning, College for Financial Planning (2005)
Financial planner, Vanguard (2019–present)

John Carey Morency (1996)
B.S. Business administration, University of New Hampshire (2019)
Financial planner, Vanguard (2022–present); financial planner, MML Investor Services (2019–2022); financial services professional, MassMutual Life Insurance Company (2019–2022); financial services professional, Mutual of Omaha Insurance Company (2019); inside sales representative, Harbour Capital Corporation (2019)

William Kerry Morgan, CFP® (1994)
B.A. Language and International trade, Clemson University (2017)
Financial planner, Vanguard (2021–present); financial advisor, Resolute Capital LLC (2020–2021); financial advisor, Edward Jones (2019–2020)

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B.S. Hospitality management, Northern Arizona University (1994)
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Financial planner, Vanguard (2021–present); advisor support representative, Vanguard (2020–2021); financial planner, Vanguard (2019–2020)

David Morrison, CFP® (1985)
B.A. Music education, Temple University (2009)
Financial planner, Vanguard (2021–present); client solutions associate, Vanguard (2020–2021); retirement plan specialist, Vanguard (2019–2020)

Glen Morrison, CFP® (1968)
B.A. Fine arts, Humberside Polytechnic (1990)
M.S. Personal financial planning, College for Financial Planning (2021)
Financial planner, Vanguard (2019–present)

Jina Leonardi Muir (1968)
B.A. Psychology, Temple University (1991)
M.S. Psychology, The University of Baltimore (1995)
Financial planner, Vanguard (2022–present); Vanguard Return to Work intern, Randstad (2022); executive assistant, Taurus Investment Group, LLC (2022); executive assistant, The Philadelphia International Opera (2022)

Danny Geofrey Murego (1997)
B.S.B.A. Finance and Management information systems, The University of Arizona (2020)
Financial planner, Vanguard (2022–present); client case representative, Vanguard (2021–2022); client representative, Vanguard (2021); student fundraiser, Ruffalo Noel Levitz (2020); investment analyst intern, MRA Associates (2019); Take Charge Cats ambassador, Take Charge America Institution (2019–2020)
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B.S.F.C.S. Financial planning, University of Georgia (2019)
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Financial planner, Vanguard (2020–present); financial advisor development program, Vanguard (2019–2020); intern, Cannon Financial Strategists, Inc. (2019); tutor, University of Georgia Athletic Association (2019)

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Financial planner, Vanguard (2019–present)

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B.S. Finance, Ferris State University (1989)
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B.A. English language and literature, University of Maryland (2009)
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Financial planner, Vanguard (2023–present); vice president – financial consultant, Charles Schwab (2022–2023); financial planner, Mercer Global Advisors (2021); financial consultant, E*TRADE (2019–2021); private client banker, JPMorgan Chase (2019); financial advisor, Edward Jones (2019)

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Manager, Vanguard (2023–present): financial planner, Vanguard (2022–2023); sales support specialist, First Command Financial Services, Inc. (2019–2022)

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Financial planner, Vanguard (2021–present); associate financial advisor, Wells Fargo Advisors (2019–2021); portfolio analyst, Pacific Western Bank (2019)

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A.S. Education, Phoenix College (2007)
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Manager, Vanguard (2019–present)

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Financial planner, Vanguard (2021–present); financial planner, Personal Capital (2019–2021)

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M.S. Personal financial planning, College for Financial Planning (2020)
Financial planner, Vanguard (2022–present); financial planner, Charles Schwab (2019–2022)

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Financial planner, Vanguard (2020–present); portfolio implementation associate, Vanguard (2019–2020); specialized services representative, Vanguard (2019)

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B.S Engineering science and mechanics, The Pennsylvania State University (1989)
Financial planner, Vanguard (2022–present); teacher, Wythe County Public Schools (2020–2022); financial advisor, Ameriprise Financial (2019–2020)
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Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2021–present); financial advisor development program, Vanguard (2020–2021); teaching assistant to the chancellor emeritus, Texas Tech University (2019–2020); summer associate, FJY Financial LLC (2019); executive assistant, First State Bank (2019)

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Financial planner, Vanguard (2023–present); advance to financial planning associate, Vanguard (2022–2023); line cook, Cougar Country Drive-In (2022); supervisor, Overlake Golf and Country Club (2019–2021); research intern, Washington Policy Center (2021)

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B.S. Business administration, Minnesota State University Mankato (1992)
Financial planner, Vanguard (2019–present)

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B.A. Human communication, Arizona State University (2010)
Financial planner, Vanguard (2019–present)

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Financial planner, Vanguard (2020–present); emerging leaders development program, Vanguard (2019–2020)

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B.S. Botany, Ranchi University (1976)
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Ty Nolan Tabile (1992)
B.S. Finance, Brigham Young University – Hawaii (2021)
Financial planner, Vanguard (2022–present); financial representative, Northwestern Mutual (2020–2022); loss prevention associate, Ross (2020); solar sales manager, Vivint Solar (2020); handyman, Farnsworth Homes, Incorporated (2019); business owner, Cups and Cakes (2019); traveling member experience officer, Mountain America Credit Union (2019)

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B.S. Management, Clemson University (2012)
Financial planner, Vanguard (2019–present)

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B.A. Liberal arts, Cabrini University (2000)
Financial planner, Vanguard (2019–present); financial consultant, Fidelity Investments (2019)
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Financial planner, Vanguard (2019–present)

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B.B.A. Finance and Financial planning, Temple University (2019)
Financial planner, Vanguard (2021–present); relationship manager, Forge Wealth Management (2019–2021); client services associate, Leon L. Levy & Associates (2019)

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B.S. Finance, California State University, Northridge (2021)
Financial planner, Vanguard (2022–present); advance to financial planning associate, Vanguard (2021–2022); accounts payable assistant, Gold's Gym SoCal (2019–2020); accounts payable processor, Robert Half Staffing Company (2019); performance and quality assurance specialist, Life Alert Emergency Response Inc. (2019)

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Financial planner, Vanguard (2019–present)

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B.S. Athletic training, Kent State University (2013)
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B.S.B.A. Marketing, Creighton University (2021)
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Manor College (1993, non–degree)
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Financial planner, Vanguard (2022–present); client consultant, Vanguard (2021–2022); financial planner, Aventus Advisors, Inc. (2019–2021)

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B.S. Finance, University of Delaware (2015)
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Disciplinary information

Other than those included with a financial planner's information above, there are no material legal or disciplinary events to disclose for the financial planners listed.

Other business activities

Other than those included with a financial planner's information above, there are no business activities to disclose for the financial planners listed.

Additional compensation

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Financial planners' recorded calls, emails, and written advice are monitored by random sample. Results of the monitoring are reviewed with the individual planner by his or her direct supervisor and are reviewed in aggregate at the department level by the department head.

Verification that the monitoring is taking place as required is reviewed in aggregate at the department level by the department head.

Jonathan Cleborne (1980), a principal and head of Vanguard Advice, is the person responsible for supervision of the financial planners. He joined Vanguard in 2003 and has held positions as head of Portfolio Review (2017–2018), head of Product Strategy (2014–2016), and key accounts sales manager for Financial Advisor Services (2010–2014). Mr. Cleborne earned a B.A. from the University of Virginia and an M.B.A. from the Tuck School of Business at Dartmouth College.

If you have any questions about our services, please call 844-899-0113 and leave your name and a phone number where you can be reached. A member of our management team will contact you within two business days. Please note, this document is not intended for you to select a specific advisor. As part of our services, Vanguard will align you with an advisor.

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