

Carrie Schwab-Pomerantz, author of

THE CHARLES SCHWAB GUIDE TO FINANCES AFTER FIFTY

Carrie Schwab-Pomerantz, CFP®, is president of Charles Schwab Foundation, a private, nonprofit organization funded by The Charles Schwab Corporation, whose mission is to help people achieve financial well-being. In addition, Schwab-Pomerantz serves as director and chairman of the board of Schwab Charitable, which, as one of the country's largest donor-advised funds, has facilitated billions of dollars in grants since its inception in 1999.

Under her leadership, the Foundation has established two notable financial education programs designed to speak to people at opposite ends of the age spectrum. *Money Matters: Make It Count*SM, a national personal finance program for teens created in collaboration with Boys & Girls Clubs of America, was cited by U.S. Treasury's National Strategy on Financial Literacy as a best public-private sector initiative in 2006. *AARP Foundation Finances 50+*SM, developed with AARP Foundation, is a financial capability program for low-income workers and jobseekers age 50 and older. The Foundation also supports the philanthropy of Schwab employees, encouraging and rewarding volunteerism in programs that promote financial literacy.

In 2010 Schwab-Pomerantz was appointed by President Obama to the President's Advisory Council on Financial Capability, and served as chair of the Partnership Committee until early 2013 when the Council's term expired. In that role, she led the Council's efforts to strengthen and enhance coordination between public and private-sector financial education programs.

With her father, Charles R. Schwab, Schwab-Pomerantz co-authored *It Pays to Talk: How to Have the Essential Conversations with Your Family about Money and Investing* (Crown Business: 2002). *Publishers Weekly* called the book "a well-rounded primer that provides one-stop shopping for the many phases of financial understanding and planning." Schwab-Pomerantz currently writes a personal finance column called *Ask Carrie*, which appears weekly on schwab.com, Parade.com, and is syndicated through Creators News Service.

Schwab-Pomerantz speaks and writes extensively about personal finance issues, offering guidance and advice for consumers. Her public appearances have included the World Affairs Council of Philadelphia and the San Francisco Commonwealth Club, in addition to appearances on Good Morning America, The Today Show, CNBC and NPR. For ten years (2003-2011, 2013), The *San Francisco Business Times* named her one of the San Francisco Bay Area's 100 Most Influential Women in Business. In 2011, Schwab-Pomerantz received the William E. Odom Visionary Leadership Award, Jump\$tart Coalition's highest recognition for individual contributions to the financial literacy and education of students.

Schwab-Pomerantz serves on the national board of governors of Boys & Girls Clubs of America and is also the chair of the board of trustees for the Pacific region. Additionally, Schwab-Pomerantz is on the board of directors of Decker Communications and the board of directors of the International Women's Forum Leadership Foundation, a global organization dedicated to promoting women leaders.

Schwab-Pomerantz earned a BA from the University of California, Berkeley, and an MBA from George Washington University. She holds FINRA Series 7, 23, 63 and 8 registrations, and is a CERTIFIED FINANCIAL PLANNERTM certificant.

Schwab-Pomerantz lives with her husband, author Gary M. Pomerantz, and their three children in the San Francisco Bay Area.