



Speaker Biographies

Winter 2020 Speaker Program



Mary Jovanovich

Senior Relationship Manager, Schwab Charitable

Mary joined Schwab Charitable in 2015 and has more than 10 years experience with Charles Schwab & Co., Inc. Previously, with Schwab Private Client, Mary provided strategic supervisory guidance for managers and portfolio consultants offering investment advisory solutions. Mary is committed to helping financial consultants and advisors build successful practices and deepen relationships with their clients by incorporating charitable planning into their wealth management strategies.

Mary is involved as a current board member and previously as secretary for Dress for Success Indianapolis, and also serves on both the Integrating Woman Leadership Foundation Board and Indiana Wesleyan's Alumni Board. In addition, Mary volunteers at Coburn Place and the Him by Her Foundation.

Mary obtained her master's degree in management from Indiana Wesleyan University. She holds a number of FINRA securities registrations (Series 7, 9, 10, 24, 63, and 66) and an Indiana Life & Health Insurance license. She is currently pursuing a graduate certificate in philanthropic studies with Indiana University's Lilly Family School of Philanthropy.



Hayden Adams, CPA, CFP

Director, Tax & Financial Planning, Schwab Center for Financial Research, Charles Schwab & Co, Inc.

Hayden Adams provides analysis and insights on topics such as income tax planning, tax-smart investing, asset location and retirement withdrawal strategies for a range of Schwab clients and advisors.

Prior to joining the Schwab Center for Financial Research (SCFR), Hayden led Schwab's tax compliance function, providing expertise on tax reporting for Schwab clients. He also served as Schwab's lead representative on tax regulatory matters—using his eight years of experience with the IRS to offer guidance on various tax topics. His past work also includes financial reporting for an international insurance company and audit services in public accounting.

Hayden is a Certified Public Accountant (CPA), Certified Financial Planner (CFP®), and a board member of the Tax Executive Institute in Colorado. He has a bachelor's degree in finance and accounting from the University of Central Florida.