LONGER FORM BIO

Bill Harris
Founder and CEO, Evergreen Wealth

Bill Harris is the Founder and CEO of Evergreen Wealth, a digital Registered Investment Advisor (RIA) that delivers hyper-personalized, tax-optimized, Dynamic Portfolios™ for high-earning professionals and affluent families, particularly those in high-tax states, helping them to build long-term generational wealth.

With a career spanning more than three decades at the intersection of finance and technology, Bill has built and led multiple enterprises that have reshaped how people manage, protect, and grow their wealth.

Before launching Evergreen Wealth, Bill founded Personal Capital, one of the first digital wealth management firms to combine human advisors with robust fintech infrastructure. Under his leadership, Personal Capital grew to more than $23 billion in assets before being acquired by Empower Retirement for $1 billion in 2020. Bill also served as CEO of Intuit, where he spearheaded the company's expansion into online personal finance, small business services, and tax preparation tools, including TurboTax and QuickBooks. During his tenure, Intuit's market capitalization grew significantly, and Harris led more than a dozen acquisitions for Intuit, including Lacerte Software and CheckFree. Earlier, Harris was the former CEO of PayPal, guiding the company through its launch, early hypergrowth, and $125M in equity financing that set the foundation for PayPal's global dominance in digital payments.

Beyond his leadership roles, Bill has founded and scaled numerous fintech and security ventures, including MyVest, PassMark Security, IronKey and One Finance (a neobank acquired by Walmart in 2022). His companies have consistently been at the forefront of financial technology innovation, from digital wealth platforms and secure authentication systems to portfolio management software and consumer fintech apps.

Bill has also served on the boards of prominent public and private companies, including Macromedia, SuccessFactors, Care.com, Yodlee, GoDaddy, Avalara and Business.com. His board work spans industries from software and analytics to online marketplaces, reflecting his expertise in scaling technology-driven businesses.

A recognized authority on investment tax strategy, Bill is the author of *Investment Tax Guide: How to Slash Your Taxes*, which emphasizes after-tax returns as the single most important measure of investment success, a principle that underpins Evergreen Wealth's approach to Dynamic Portfolios.

Bill holds an MBA from Harvard Business School and a BA from Middlebury College.

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A fintech pioneer with over three decades of leadership at the intersection of finance and technology, Bill has founded and led multiple companies that have become household names, reshaping how people manage, protect, and grow their money. Before founding Evergreen Wealth, he was the former CEO of PayPal, guiding the company through its launch and early growth; the former CEO of Intuit, where he oversaw the expansion of TurboTax, Quicken, and QuickBooks and grew the company's market cap nearly tenfold; and the founder of Personal Capital, which scaled to $23 billion in assets before its $1 billion acquisition by Empower Retirement.

Beyond Evergreen Wealth, Bill has launched and scaled several other companies, including MyVest, PassMark Security, IronKey, and One Finance (acquired by Walmart in 2022). He has also served on the boards of Macromedia, SuccessFactors, Care.com, Yodlee, GoDaddy, Avalara and Business.com.

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