

# Nationally Recognized Investment Firms Operating in Virginia

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Table of popular investment firms with a strong presence in Virginia.

The table provides publicly available information for their legal departments, not the private contact details of individual employees, nor the official registered agent of the entities.

**Where stated in the footnotes, email addresses were accessed August 27, 2025 from publicly available documents. The writer has confirmed none of them.**

Firm	Vice President for Legal Affairs and In-house Legal Counsel (Name)	Address of Legal Counsel	Telephone Number of Legal Counsel	Email Address of Legal Counsel
Charles Schwab	Peter J. Morgan III, Managing Director, General Counsel & Corporate Secretary	Charles Schwab Corporate Headquarters 600 W. Chicago Avenue Chicago, IL 60654	(800) 435-4000 (General Corporate Number)	Not publicly available <sup>1</sup>
Edward Jones	Keir Gumbs, Principal & Chief Legal Officer	Edward Jones Corporate Headquarters 12555 Manchester Road	(314) 515-2000 (General Corporate Number)	Not publicly available

<sup>1</sup> See [Scott McMillen](#) Vice President and Associate General Counsel Charles Schwab & Co., Inc. E-mail: [Scott.McMillen@Schwab.com](mailto:Scott.McMillen@Schwab.com) Tel. (415) 667-1602.

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St. Louis, MO  
63131

Fidelity Investments	Jonathan Chiel, Executive Vice President and General Counsel	Fidelity Investments Corporate Headquarters 245 Summer Street Boston, MA 02210	(800) 343-3548 (General Corporate Number)	Not publicly available <sup>2</sup>
JPMorgan Chase	Stacey Friedman, General Counsel and member of the Operating Committee	JPMorgan Chase Corporate Headquarters 383 Madison Avenue New York, NY 10179	(212) 270-6000 (General Corporate Number)	Not publicly available <sup>3</sup>
Morgan Stanley	Eric F. Grossman, Chief Legal Officer and Chief Administrative Officer	Morgan Stanley Corporate Headquarters 1585 Broadway New York, NY 10036	(212) 761-4000 (General Corporate Number)	Not publicly available <sup>4</sup>
UBS Financial Services Inc.	Barbara Levi, Group General Counsel	UBS Americas Headquarters 1285 Avenue of the Americas New York, NY 10019	(212) 713-2000 (General Corporate Number)	Not publicly available <sup>5</sup>

<sup>2</sup> See [Rocket](#).

<sup>3</sup> [Stacey.Friedman@jpmorgan.com](mailto:Stacey.Friedman@jpmorgan.com), from Texas [Attorney General subpoena](#).

<sup>4</sup> [eric.grossman@morganstanley.com](mailto:eric.grossman@morganstanley.com), from [Contact Out](#).

<sup>5</sup> [barbara.levi@ubs.com](mailto:barbara.levi@ubs.com), UBS Group General Counsel, Attn Barbara Levi Bahnhofstrasse 45 8001 Zurich, Switzerland, from [Form F-4 registration](#).

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Vanguard	Tonya T. Robinson, General Counsel and Secretary of the Vanguard Funds	Vanguard Corporate Headquarters P.O. Box 2600 Valley Forge, PA 19482	(610) 648-6000 (General Corporate Number)	Not publicly available <sup>6</sup>
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**Disclaimer: This report is based on publicly available corporate information. Corporate leadership roles and legal representation can change over time**



<sup>6</sup> [Linked In.](#)  
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