Balanced toward Growth

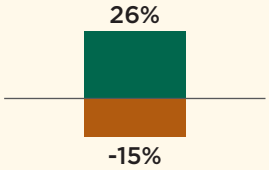
Our Long-term Outlook

This outlook is based on our long-term return expectations for this portfolio objective in most market environments.

Expected Average Annual Return

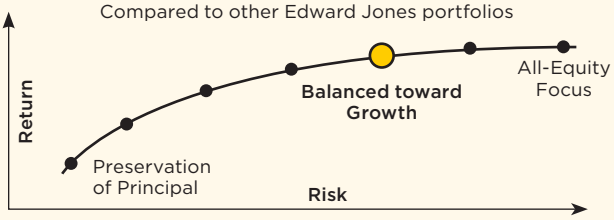
5.0%–7.0%

Expected Range of Returns in Any One Year



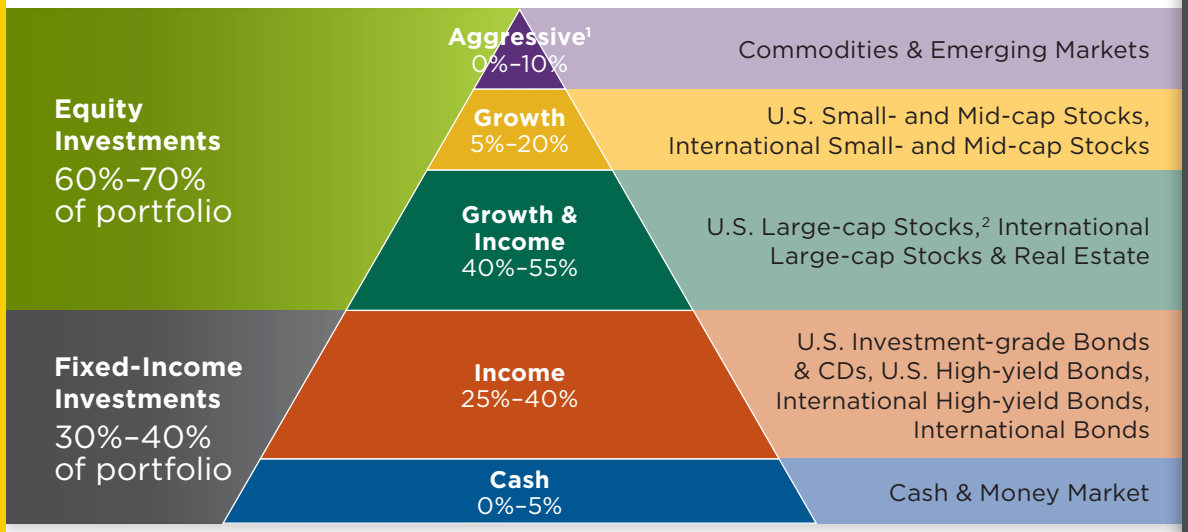
Relative Risk and Return

Compared to other Edward Jones portfolios



How to Build This Portfolio

We recommend using the following ranges of investment categories and asset classes as a guide when selecting investments to build this portfolio.



[1] Alternative investments and stocks trading less than $4 align with the Aggressive investment category, but they are not recommended.
[2] Large-cap stocks that do not pay a dividend are in the Growth investment category.

This Portfolio Objective:

Emphasizes higher long-term growth and rising dividend potential, with a secondary goal of current interest income.

Over the long term, should have moderate to higher risk.

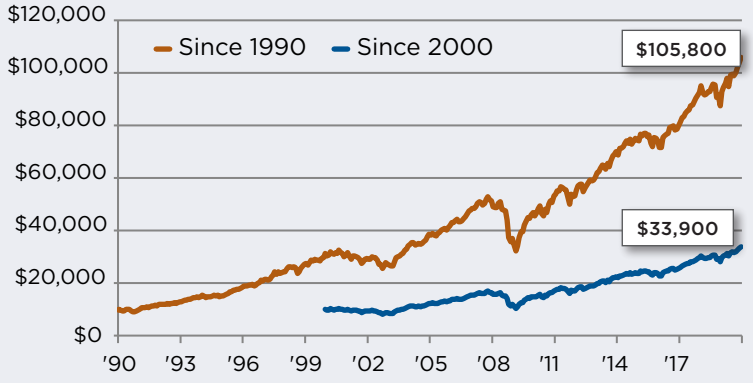
Is expected to have somewhat smaller fluctuations in value and somewhat lower long-term return potential than the stock market.

Holds approximately 15%–35% in international investments and no more than 10% in high-yield bonds or other aggressive-income investments.

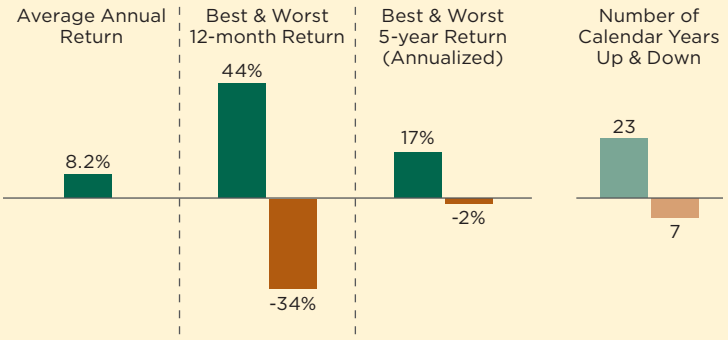
A Historical Perspective

What this portfolio's recommended mix of investments could have experienced since 1990:

If You Invested $10,000: Hypothetical Performance



Taking a Look Back: 1990–2019



Past performance is no guarantee of future results. Results rounded to the nearest $100.
See Page 2 for more information on how historical performance is calculated.

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For more information about each section, see Page 2.

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Balanced toward Growth

Our Long-term Outlook

Setting reasonable expectations for your investments' performance and risk is critical as you build your strategy to achieve your financial goals. To help you do this, we've highlighted our long-term perspective for this portfolio objective.

Expected returns are based on our long-term expectations for the asset allocation illustrated and incorporate our estimates for U.S. equity (5.5%–7.5%), international equity (7.0%–9.0%) and fixed-income investments (3.0%–4.25%). This does not factor in potential fees and taxes that could reduce your actual return. There is no guarantee that you will earn this return if you hold investments in line with this objective.

Since the return for any given year could be quite different from the long-term average, the expected range of returns chart illustrates our estimates of the range of possible fluctuations this portfolio could experience in any one-year period. We also illustrate the relative return and risk profile of this objective compared to the other Edward Jones portfolio objectives.

How to Build This Portfolio

While diversification cannot guarantee a profit or protect against loss, we believe having the proper asset allocation, diversified across asset classes, is critical to achieving long-term expected returns. This section highlights the key investment categories and asset classes, along with recommended ranges, to build a portfolio with this objective, in order of priority:

1. **Equity and Fixed-Income Mix**
2. **Investment Categories and Asset Classes**

A Historical Perspective

Past performance does not guarantee future results. But reviewing historical performance can provide some perspective when determining whether the portfolio aligns with your comfort level for risk and your overarching goals. This section highlights the hypothetical performance our recommended allocation for this objective could have experienced since 1990, using the allocations and indexes below to represent different asset classes.

Allocations and Indexes Used to Calculate Historical Performance

Investment Category	Asset Class	Index	Weight%*
Aggressive	Commodities	S&P GSCI	1%
	Emerging-market Stocks	MSCI Emerging Markets	4%
Growth	Developed Int'l Small- and Mid-cap Stocks	MSCI EAFE Small-cap	3%[1]
	U.S. Small-cap Stocks	Russell 2000	3%
	U.S. Mid-cap Stocks	Russell Mid-cap	7%
Growth & Income	Developed Int'l Large-cap Stocks	MSCI EAFE	13%
	Real Estate	FTSE NAREIT All Equity REITs	4%
	U.S. Large-cap Stocks	S&P 500	30%
Income	International Bonds	Bloomberg Barclays Global Aggregate Ex USD	2%
	International High-yield Bonds	Bloomberg Barclays Global High Yield USD	2%
	U.S. High-yield Bonds	Bloomberg Barclays U.S. HY 2% Issuer Cap	3%[2]
	U.S. Investment-grade Bonds	Bloomberg Barclays U.S. Aggregate	26%
Cash	Cash	Bloomberg Barclays U.S. Treasury Bellwether 3-Month	2%

Sources: S&P, MSCI, Russell, FTSE, Barclays

*Index performance covers the dates 1/1/1990–12/31/2019 unless noted otherwise.

[1] For periods prior to 2001, the S&P Developed Ex-U.S. Small-cap Index was used.

[2] For periods prior to 1993, the Barclays U.S. Corporate High Yield Index was used.

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Diversification does not guarantee a profit or protect against loss.

Past performance is not a guarantee of future results. An index is unmanaged and is not available for direct investment.

Performance does not include payment of any expenses, fees or sales charges, which would lower the performance results.

The expected range of returns in any one-year calculation incorporates +/- 2 standard deviations.

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