

OVERVIEW OF EDWARD JONES



edwardjones.ca

Edward Jones[®]



History

- Founded in 1922 by Edward D. Jones Sr.
- Canadian Headquarters in Mississauga, Ontario
- First Canadian branch opened in 1994 located in Nepean, Ontario
- U.S. Headquarters in St. Louis, Missouri

Edward Jones is a limited partnership in Ontario, Canada, and is a wholly owned subsidiary of Edward D. Jones & Co., L.P., a Missouri limited partnership (“Jones US”). Jones US and its parent do not guarantee the obligations or liabilities of Edward Jones.

Edward Jones Today

North American presence

Headquarters

- Mississauga, Ontario, Canada
- St. Louis, Missouri, USA

Company

- An associate-owned private partnership with more than 40,000 associates

Branches

- More than 17,000 branch offices across the United States and through the firm's affiliate in Canada

Clients

- Nearly 7 million clients
- \$1.1 trillion in assets under care

Data as of May 2019.



Edward Jones Today

Canadian Presence

Headquarters

- Mississauga, Ontario, Canada

Company

- An associate-owned private partnership with more than 1,800 associates

Branches

- More than 650 branch offices and 850 advisors across Canada

Clients

- More than 240,000 clients

Data as of January 2020



Where We Are

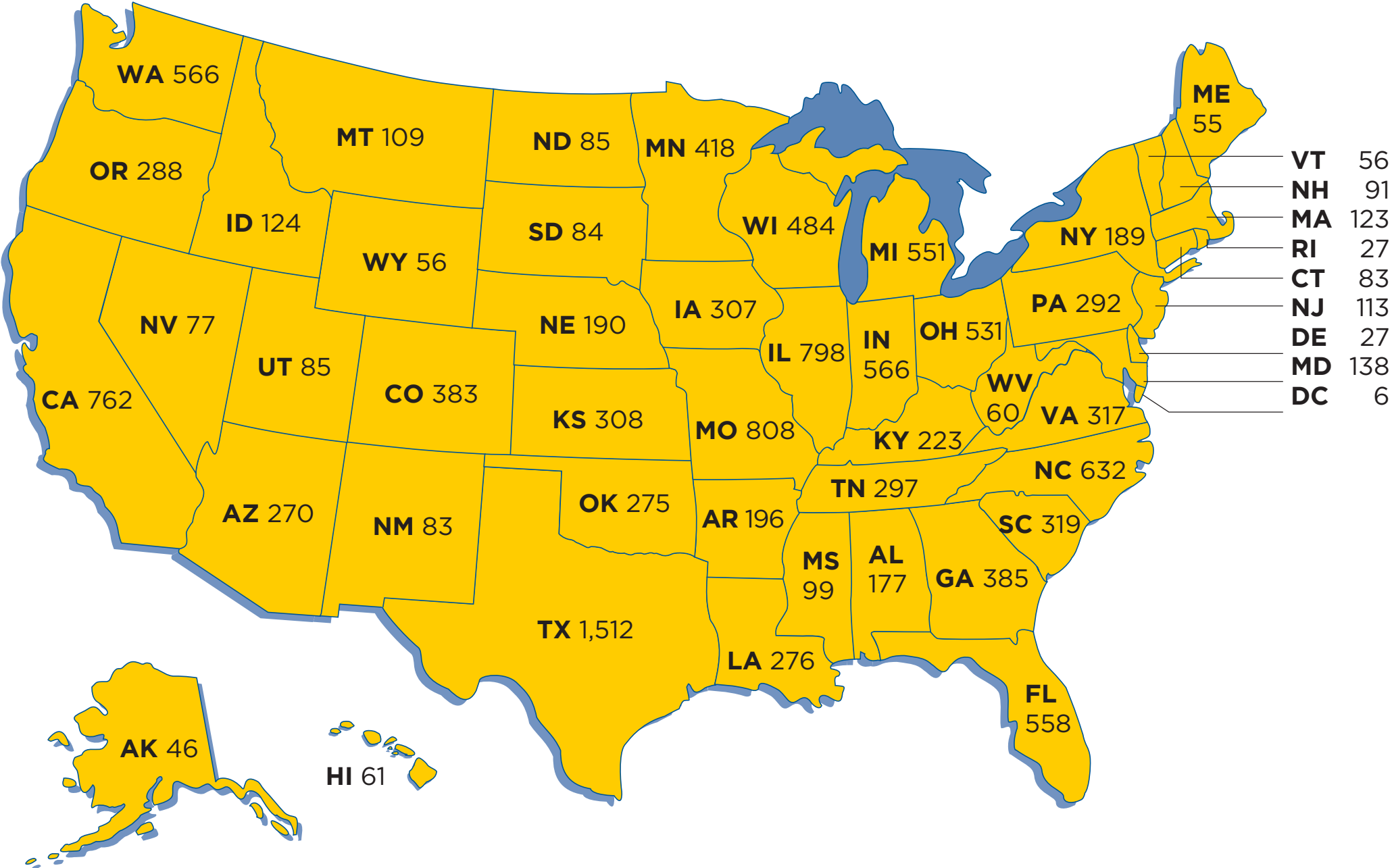
CANADA BRANCH OFFICES



As of April 20, 2020

Where We Are

UNITED STATES BRANCH OFFICES



As of 30/04/19

Recognition



J.D. POWER 2020 Canada Full-Service Investor Satisfaction Study - Eight Years in a Row

Edward Jones was ranked “Highest in Investor Satisfaction with Full-Service Brokerage Firms”¹ according to this study.

KINCENTRIC
Best Employer

CANADA 2020

KINCENTRIC, 2020 Best Employers in Canada

For the 19th consecutive year, Edward Jones placed in the top 25% for employee engagement in 2020 List of Best Employers in Canada published in the Financial Post.

IE INVESTMENT EXECUTIVE

INVESTMENT EXECUTIVE’S BROKERAGE REPORT CARD

Edward Jones tied for 2nd place overall in Investment Executive’s 2020 annual survey of advisors. This is Edward Jones’ 23rd consecutive appearance in the annual survey, April 2020.

¹ Edward Jones received the highest score in the J.D. Power 2013-2020 Canada Full-Service Investor Satisfaction Studies of investors’ Satisfaction Studies of Investors’ satisfaction with their full-service investment firm. Visit jdpower.com/awards.

Study based on responses from 4,382 investors who make some or all of their investment decisions with a financial advisor regarding their investment account, based on 8 factors. The study was fielded between November 2019 and January 2020. Rating may not be indicative of future performance or results.



What Makes Us Unique

- Commitment to serious, long-term investors
- Financial advisor offices in convenient locations
- Face-to-face relationships
- Partnership structure

Our Purpose

To provide solutions that help individuals pursue their serious, long-term financial objectives, including:

- Preparing for retirement
- Living in retirement
- Paying for education
- Preparing for the unexpected
- Planning your estate or inheritance





®

Investment Philosophy

- Buy quality • Invest for the long term • Diversify

Diversification does not guarantee a profit or protect against loss.

Investments & Protection

Investments

- Annuities
- Equity Investments
- Fixed-income Investments
- Guaranteed Investment Certificates (GIC)
- Investment Programs
- Edward Jones Guided Portfolios®
- Edward Jones Portfolio Program®
- Mutual Funds
- Treasury Bills

Protection

- Critical Illness Insurance
- Disability Insurance
- Long-term Care Insurance
- Permanent Life Insurance
- Universal Life
- Whole Life
- Term Life Insurance



Insurance and annuities are offered by Edward Jones Insurance Agency (except in Quebec). In Quebec, insurance and annuities are offered by Edward Jones Insurance Agency (Quebec) Inc.

Edward Jones Guided Portfolios® is a fee-based account. Please review the applicable Edward Jones Guided Portfolios Agreement for more information. Many of the investments in Guided Portfolios are offered by prospectus. You should consider the investment objectives, risks, and charges and expenses carefully before investing. The prospectus contains this and other important information. Where applicable, your Edward Jones advisor can provide a prospectus, which you should read carefully before investing.

The Edward Jones Portfolio Program® is a comprehensive managed investment program that combines personal investment strategy driven by the advisor and professional portfolio management driven by a global asset manager SEI.

Services

- Cash Management Services
 - Edward Jones Personal Line of Credit¹
 - Edward Jones Premium Interest Account (PIA)
 - Mortgage Referral Service²
- Client Consultation Team
- Company Retirement Plans
- Equity Research
- Financial Calculators
- In-trust Accounts
- Individual Plans
- Insurance Specialists
- Investor Education Programs
- Online Access
- Portfolio and Retirement Plan Reviews
- Pre-Authorized Chequing Plans (PACs)
- Registered Disability Savings Plans (RDSPs)
- Registered Education Savings Plans (RESPs)
- Systematic Investing

Edward Jones, its employees and financial advisors are not estate planners and cannot provide tax or legal advice. Please consult a qualified tax specialist or lawyer for professional advice regarding your specific situation.

¹ Your personal Line of Credit is a margin account. Borrowing against securities involves greater risks than using cash resources only and is not appropriate for everyone. Your responsibility to repay the loan and interest continues, even if the value of the securities declines. If the value of your securities declines, you may be required to deposit funds, additional securities, or sell the securities in your account to meet the margin call. Interest begins to accrue from the date funds are borrowed and is charged to the account. Rates are subject to change without notice. Available only for certain account types and subject to approval.

² Mortgages are offered through Manulife Bank of Canada and Manulife Trust Company.

Systematic Investing does not guarantee a profit or protect against loss.

A Team of Professionals Working for You



Edward Jones, its employees and financial advisors cannot provide tax or legal advice. Please consult a qualified tax specialist or lawyer for professional advice regarding your specific situation.

Questions & Answers

Thank You

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