



**We are updating your account  
and disclosure documents**



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The U.S. Department of Labor has issued a regulation regarding how financial services firms work with their clients who invest for retirement. The regulation, which takes effect Dec. 20, 2021, states that Edward Jones operates under a fiduciary standard of care when providing investment advice on most brokerage retirement accounts. This means we must, among other things: give you prudent and loyal advice; avoid misleading statements about conflicts of interest, fees and investments; and charge no more than is reasonable for our services.

As a result of this regulation, the following documents are being updated to reflect that beginning Dec. 20, 2021, Edward Jones, and your financial advisor, will operate under a fiduciary standard of care when providing advice in these accounts. Our records indicate you are invested in an account that utilizes at least one of the following account agreements:

- Edward Jones Retirement Account Agreement
- Edward Jones Select Retirement Account Client Services Agreement
- Edward Jones Roth Individual Retirement Account Custodial Agreement
- Edward Jones SIMPLE Individual Retirement Account Custodial Agreement
- Edward Jones Traditional Individual Retirement Account Custodial Agreement

In addition, the document "Important Information About Our Brokerage Services," which contains information about your brokerage account including the scope of our brokerage relationship, costs, compensation and related conflicts of interest, has been updated to reflect this change in the standard of care.

You can find the most up-to-date versions of these documents at [edwardjones.com/disclosures](https://edwardjones.com/disclosures). You can also obtain copies of the updated documents from your financial advisor.

**No action is required on your part.** Please contact your financial advisor if you have any questions. Thank you for choosing Edward Jones to help you reach your financial goals.

