

Welcome to our 2022 Purpose, Inclusion and Citizenship Report: Partnering for Positive Impact. As we celebrate 100 years of history and look to the next 100 years, Edward Jones continues to put our purpose in action, making a positive impact for our clients, colleagues, communities and society. We do it by partnering with our clients, one another and with organizations that share our passion and our purpose. Together, we have an ability to impact and enable future generations.

Our purpose – to partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society – is brought to life in this report in three areas of impact. All of this is being achieved through new ways of working and demonstrated through our five culture mindsets: Leadership, Place of Belonging, Continuous Learning, Effective Decision-Making and Growing Our Impact.

Partnering for Lasting Financial Strength reflects our belief in the power of financial knowledge and a personal approach to building long-lasting financial strength. Our nearly 19,000 financial advisors serve more than 7 million clients in approximately 3,000 communities across North America every day. We strive to provide access to financial knowledge for our clients and help people connect to their own purpose and achieve things in their lives they might not have known were possible. To date, through our Financial Fitness resources, we've helped reshape the relationship with finances for more than 365,000 people, in person and online, with a goal of reaching 1 million adults and youth by the end of 2025.

We are dedicated to Promoting Healthier Futures because we know pervasive health issues stand in the way of people building, maintaining and enjoying financial well-being. In 2021, we continued our long-standing alliance with the Alzheimer's Association®. Together, we enhance programming, provide educational materials, fund critical research and impact early detection of the disease. Internally, supporting healthier futures for everyone also means ensuring eligible associates and their family members have access to insurance and comprehensive health care, including preventive care and mental health services. And for our clients, it means providing opportunities to make a positive impact on our collective future through sustainable investment options such as donor-advised funds.

Advancing Inclusive Growth demonstrates our belief that every person deserves the opportunity to thrive, regardless of where they start in life. That's why we focus on diversity, equity and inclusion – and make intentional investments to lift our communities. We continue to make progress advancing our commitment to expand diversity, equity and inclusion at all levels of our organization.

We remain steadfast in fostering a place of belonging for everyone and deepening accountability through our diverse representation goals. Our efforts to foster economic inclusion extend into our communities. We actively collaborate with organizations to make meaningful progress, enabling the St. Louis region, where we were founded 100 years ago, and other communities where we are located to thrive inclusively.

As a firm, we are in an exciting period of transformation, which has no doubt been accelerated in many respects by the pandemic. However, we remain fully dedicated to actualizing our purpose through a multi-stakeholder lens, and we are committed to reporting our goals and our progress with transparency and rigor. Those principles guide us as we make continued investments of our time, talent and treasure in dozens of nonprofit organizations and public institutions that share our ambition and understand our responsibility.

As we reflect on 100 years of positive impact in the communities we serve, we also look ahead, applying what we've learned to continue growing our impact. We believe in the growth of possibility for more lives, across all generations and walks of life.

Together, we will make a difference.

Penny Pennington,
Managing Partner
Edward Jones