

# Partnering for positive impact

## 2022 Purpose, Inclusion and Citizenship Report

At Edward Jones, our purpose is to partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society. Our fourth annual Purpose, Inclusion and Citizenship Report, **Partnering for Positive Impact**, highlights some of the many ways we brought our purpose to life through our culture in 2021.

As we reflect on 100 years of history and look to the next 100 years, we continue to put our purpose in action, making a positive impact for 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.

The report is organized in three areas – Partnering for Lasting Financial Strength, Promoting Healthier Futures and Advancing Inclusive Growth – and highlights our goals, commitments and progress.

### Partnering for Lasting Financial Strength

We believe in the power of financial knowledge and a personal approach to build long-lasting financial strength. That's why we work to educate and support people in creating intergenerational wealth. This philosophy comes to life in many ways, including our Financial Fitness program, designed to address financial health among younger generations, and our Grassroots Task Force, which serves as our voice for the individual investor in our nation's capital.

### Promoting Healthier Futures

We believe pervasive health issues stand in the way of people building, maintaining and enjoying wealth in life. Whether it's through our support for the Alzheimer's Association®, offering sustainable investment products or helping our clients give to charities through the Edward Jones Charitable Gift Fund, we work to promote the financial and emotional well-being of those impacted by health issues, so each person can live an enriching life.

### Advancing Inclusive Growth

We believe every person deserves the opportunity to thrive – regardless of where they start. That's why we invest to lift all people and communities, including the underserved, by equipping more people to fully participate in the economy and build the future they want. For us, it starts with progress toward greater diverse representation among our associates and creating a place of belonging for all.

Our impact would not be possible without the time, treasure and talent our approximately 50,000 associates invest in their local communities. Time and time again, we demonstrate that when we bring together our collective resources, reach and resolve, we can create amazing opportunities for individuals, families and communities to thrive.

To learn more, download the full report at [edwardjones.com/positiveimpact](https://edwardjones.com/positiveimpact).



# Our purpose in action: 2021 at a glance\*

Edward Jones, a Fortune 500 company headquartered in St. Louis, provides financial services across the U.S. and, through our affiliate, in Canada. Every aspect of the firm's business caters to serving individual investors and business owners in a human-centered and complete way – helping them put their purpose into action and achieve financially what is most important to them and their families.

## Clients:

**73%**

of our client relationships are deeply served\*\*



**\$1.5 billion**

invested by clients in sustainable ETFs and mutual funds

**\$225 million**

invested by clients in the Edward Jones Charitable Gift Fund, and more than \$7 million has already been granted to charities



## Bringing our purpose to life:



## Colleagues:

**22% women and 9% people of color are financial advisors**

in the U.S. and Canada – increases for both over last year demonstrating progress toward achieving representation goals by the end of 2025

**\$328,000 in disaster relief assistance**

distributed to 76 associates and families from associate and retiree contributions

**\$10 billion**

value in savings in associate retirement accounts – supported by Edward Jones' profit-sharing contribution and retirement match



## Communities:

**7.2 million pounds of paper saved**

through electronic delivery of client statements, promoting a reduction of more than

**64 million pounds**

of CO<sub>2</sub>e



**>\$26 million**

contributed through corporate, Edward Jones Foundation and associate philanthropic support to 259 organizations

**~175,000 participants**

reached in person and online through Financial Fitness educational programs – including more than 25,000 high school students

**>\$30 million**

raised through corporate and associate giving since 2016 to support the Alzheimer's Association and the fight to end Alzheimer's disease

**>200,000 Canadian dollars**

committed to The Terry Fox Foundation through corporate and associate giving as part of the inaugural Edward Jones Canada national purpose alliance

\*All data is as of December 31, 2021. \*\*"Deeply served" is a measure of the depth of client relationships that includes documenting client goals, risk tolerance and portfolio performance, and then implementing tailored solutions by way of investments, insurance and services.