

Edward Jones Privacy Policy

Section 1. Introduction

Edward Jones respects your privacy and recognizes the importance of protecting your personal information. This Privacy Policy explains how we collect information based on your interactions with our websites, mobile sites and applications, and digital ads. Please read this Privacy Policy in conjunction with the Edward Jones Privacy Notice provided pursuant to the Gramm-Leach-Bliley Act. If you are an applicant to Edward Jones, please review our separate Applicant Privacy Notice.

Section 2. Online Information Collection on Edward Jones' Websites

- a. Personal Information.** You can visit and browse an Edward Jones website and find out about our services, check on career opportunities, check a stock quote, and access other information without providing us with your personal information. We may collect personal information from a variety of sources, including when you voluntarily submit information to us, or when we collect it automatically, or from third party sources. Information we collect will be used by us and our affiliates only to offer you the highest level of service and to complement our marketing and research efforts. Personal information that you provide will not be disclosed except as provided for in this policy, unless we are required or permitted to do so by law.
- b. IP Addresses.** Edward Jones web servers collect your Internet protocol (IP) address for our system administration and internal reporting purposes. We use this information to improve our website, develop marketing, monitor website performance, and better meet client needs. When you view pages on our website, our servers log your IP address. Using IP addresses, we can determine the domain names of Internet service providers (ISPs) used to access our website. Domain name information does not include personal information about individual visitors.
- c. Cookies.** Edward Jones' website functions are based, in part, on your browser's ability to accept cookie files. Cookies are pieces of information that a website transfers to your hard drive that allow you to more easily navigate a website and customize website features that are updated each time you visit a website. For example, our website uses cookies to direct you to your financial advisor's home page and to help you build a personalized list of stock quotes for you to view.
- Cookies also help us track repeat visits to our website. Most browsers are initially set up to accept cookies. You may set your preferences to refuse cookies; however, this may limit your access to some areas of our website and may prevent your use of Edward Jones Online Account Access.
- We may also use cookies in our online advertising to monitor websites to determine which of our advertisements are most likely to appeal to you, to display advertisements to you, and then monitor your response. Please see Section V. Advertising, below, for more information.
- d. How We Respond to Do Not Track Signals.** If you have enabled your Internet browser to refuse cookies or have selected a "do not track" preference, we will honor your choices. In addition, when you visit our website with those choices enabled, those choices are communicated to third parties to not collect personal information about you or your online activities over time or across websites.
- e. Browsers.** We may collect certain information from your browser, such as your media access control (MAC) address, device type, screen resolution, operating system version,

and Internet browser type and version. We use this information to ensure that our websites function properly and for security reasons.

- f. Pixel Tags, Web Beacons, Clear GIFs, or Other Technologies.** These technologies may be used with some of our web pages, mobile applications, and HTML-formatted email messages to measure the effectiveness of our communications and success of our marketing campaigns. We may also use these technologies to compile statistics about usage and response rates and to help us resolve visitor questions about using our websites.
- g. Location Tracking.** We may collect information about your physical location through our websites and mobile applications. An example includes your physical location when you search for a nearby financial advisor using your mobile device.

Section 3. Links

For your convenience, our websites may contain links to other websites. This does not imply any affiliation with, or an endorsement, authorization, sponsorship or promotion of a non-Edward Jones website or its owner. Edward Jones accepts no responsibility for the content, products, or services provided on linked websites. If you choose to access such non-Edward Jones websites, you do so at your own risk, and you should be aware that those websites are governed by their own terms and conditions and privacy policies.

Section 4. Email

To improve our service and meet regulatory requirements, Edward Jones may monitor, review, or act upon emails you send to us. Email messages sent on the public website are not encrypted.

Section 5. Online Advertising

Information collected by our advertising service providers through cookies and other technologies may include browsing behavior, referring sites, and your response to advertisements. Data collected in this manner is only used to improve our advertising.

Edward Jones participates in the AdChoices online behavioral advertising program. If you receive a behaviorally targeted advertisement, you may click on the displayed icon to receive more information and choose to opt out. Your opt-out choices may be affected by your use of a specific device, your browser settings, or your log-on credentials. If you opt out, you may still receive online advertising from Edward Jones, which is not based on your preferences or online behavior.

Update your Edward Jones AdChoices preferences.

Section 6. Mobile Applications

Edward Jones' mobile applications allow you to access your account balances and make financial transactions. This Privacy Policy applies to any personal or other information that we may collect through our mobile applications.

Section 7. Social Media Websites

Edward Jones participates on social media platforms such as Facebook[®], Twitter[®], YouTube[®] and LinkedIn[®] that enable online sharing and collaboration among users. Any content you post, opinions you express, or personal information that you provide to social media providers is subject to the terms of use and privacy policies of those social media platforms.

Section 8. Other Aggregation Websites

Other companies offer aggregation websites and services that allow you to consolidate your financial account information from different sources (such as your accounts with us or with other financial institutions) so that you can view all of your account information through one online location. To do this, an aggregation provider may request access to your personal information, such as financial information, user IDs, and passwords. You should use caution and ensure that the aggregator company has appropriate policies and practices in place to protect the privacy and security of any information you provide or to which they are gaining access. We are not responsible for the use or disclosure of any personal information accessed by any company or person to whom you provide your user ID and password.

If you provide your Edward Jones user ID, password, or other information about your accounts with us to an aggregation website, we will consider that you have authorized all transactions initiated by the aggregation website using access information you provide, whether or not you were aware of a specific transaction. If you decide to revoke the authority you have given an aggregation website, we strongly recommend that you change your password for our website to ensure that the aggregation provider cannot continue to access your account.

Section 9. California Privacy Rights and Disclosures

These California Privacy Rights and Disclosure sections (Section 10-12) of this Privacy Policy address legal obligations and rights specified in the California Consumer Privacy Act, or CCPA. These obligations and rights apply to businesses doing business in California and to California residents. In particular, the CCPA applies to Personal Information, which is information that identifies, relates to, describes, is reasonably capable of being associated with, or could reasonably be linked, directly or indirectly, with California consumers or households. The rights described in this section of the policy may not apply to all data, such as:

- Publicly available information from government records;
- Deidentified or aggregated consumer information; and
- Information excluded from the CCPA's scope, like:
 - Health or medical information covered by the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and the California Confidentiality of Medical Information Act (CMIA) or clinical trial data; and
 - Personal information covered by certain sector-specific privacy laws, including the Fair Credit Reporting Act (FCRA), the Gramm-Leach-Bliley Act (GLBA) or California Financial Information Privacy Act (FIPA), and the Driver's Privacy Protection Act of 1994.

Please be aware that Edward Jones collects relatively limited amounts of consumer Personal Information subject to all of the rights and provisions under the CCPA because the Personal Information we obtain is largely exempted from CCPA as personal financial data subject to the federal Gramm-Leach-Bliley Act (GLBA) or Fair Credit Reporting Act (FCRA), or as Personal Information subject to an exemption under the CCPA for business-to-business (B2B) contacts. This California Privacy Rights and Disclosures section applies to the limited Personal Information that we collect directly from consumers or about consumers that is not covered under these federal exemptions or covered instead under our California privacy policies for employees or job applicants.

The following chart describes the categories of Personal Information we may have collected about you in the past 12 months and, for each category, where and why we collected it, and the categories of entities with which we shared the Personal Information, if any. We do not sell Personal Information.

PERSONAL INFORMATION				
Category of Personal Information (PI)	Examples	Sources from which PI was collected	Purpose of collection	Categories of entities with which PI was shared
Identifiers	Name, alias, postal address, residential address, email address, account name, account number, unique personal identifier, online identifier, Social Security number, driver's license number, passport number, or other similar identifiers	<ul style="list-style-type: none"> • Directly and indirectly from you or an individual authorized by you. For example, from information you provide to us or from documents you provide us related to the financial services we provide; • Directly and indirectly from activity on our websites. For example, from submissions through an Edward Jones website, including Online Access, or website usage details collected automatically; and • From service providers with which we interact to provide financial services. For example, from aggregation service providers you have authorized to provide information to Edward Jones. 	<p>We may use the PI we collect for one or more of the following purposes:</p> <ul style="list-style-type: none"> • To fulfill or meet the reason you provided the information; • To contact you to discuss the services or products you receive from us or to respond to any questions or concerns you have raised; • To provide, support, personalize, and develop our websites, products, and services; • To perform services on our behalf, such as customer service or processing and fulfilling financial transactions; • To create, maintain, customize, and secure your account with us; • To verify your identity, for other fraud, crime prevention, or anti-money laundering activities, and other compliance checks and controls; • As necessary or appropriate to protect the rights, property, or safety of us, our clients, or others; • To provide you with support and to respond to your inquiries, including to investigate and address your concerns and monitor and improve our responses; • To personalize your website experience and to deliver content and product and service offerings relevant to your interests, including targeted offers and ads through our websites; • To help maintain the safety, security, and integrity of our websites, products and services, databases and other technology assets, and business; • To respond to valid law enforcement, legal, or regulatory requests and as required by applicable law, court order, or governmental regulations; • For marketing and advertising purposes; and • For testing, research, analysis, and product development, including to develop and improve our websites, products, and services. 	<p>We may share PI we collect with one or more of the following categories of entities:</p> <ul style="list-style-type: none"> • Our affiliates; • Service providers; • Third parties to whom you or your agents authorize us to disclose your personal information in connection with financial products or services we provide to you; • Governmental entities, including federal and state regulators; and • Professional advisors, including accountancy and legal firms.

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Category of Personal Information (PI)	Examples	Sources from which PI was collected	Purpose of collection	Categories of entities with which PI was shared
<p>Personal information categories listed in the California Customer Records statute (Cal. Civ. Code § 1798.80(e))</p>	<p>A name, signature, Social Security number, physical characteristics or description, address, telephone number, passport number, driver's license or state identification card number, insurance policy number, education, employment, employment history, bank account number, credit card number, debit card number, or any other financial information, medical information, or health insurance information.</p> <p>Some personal information included in this category may overlap with other categories.</p>	<ul style="list-style-type: none"> • Directly and indirectly from you or an individual authorized by you. For example, from information you provide to us or from documents you provide us related to the financial services we provide; • Directly and indirectly from activity on our websites. For example, from submissions through an Edward Jones website, including Online Access, or website usage details collected automatically; and • From service providers with which we interact to provide financial services. For example, from aggregation service providers you have authorized to provide information to Edward Jones. 	<p>We may use the PI we collect for one or more of the following purposes:</p> <ul style="list-style-type: none"> • To fulfill or meet the reason you provided the information; • To contact you to discuss the services or products you receive from us or to respond to any questions or concerns you have raised; • To provide, support, personalize, and develop our websites, products, and services; • To perform services on our behalf, such as customer service or processing and fulfilling financial transactions; • To create, maintain, customize, and secure your account with us; • To verify your identity, for other fraud, crime prevention, or anti-money laundering activities, and other compliance checks and controls; • As necessary or appropriate to protect the rights, property, or safety of us, our clients, or others; • To provide you with support and to respond to your inquiries, including to investigate and address your concerns and monitor and improve our responses; • To personalize your website experience and to deliver content and product and service offerings relevant to your interests, including targeted offers and ads through our websites; • To help maintain the safety, security, and integrity of our websites, products and services, databases and other technology assets, and business; • To respond to valid law enforcement, legal, or regulatory requests and as required by applicable law, court order, or governmental regulations; • For marketing and advertising purposes; and • For testing, research, analysis, and product development, including to develop and improve our websites, products, and services. 	<p>We may share PI we collect with one or more of the following categories of entities:</p> <ul style="list-style-type: none"> • Our affiliates; • Service providers; • Third parties to whom you or your agents authorize us to disclose your personal information in connection with financial products or services we provide to you; • Governmental entities, including federal and state regulators; and • Professional advisors, including accountancy and legal firms.

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Category of Personal Information (PI)	Examples	Sources from which PI was collected	Purpose of collection	Categories of entities with which PI was shared
Protected classification characteristics under California or federal law	Age (40 years or older), race, color, ancestry, national origin, citizenship, religion or creed, marital status, medical condition, physical or mental disability, sex (including gender, gender identity, gender expression, pregnancy or childbirth and related medical conditions), sexual orientation, veteran or military status, genetic information (including familial genetic information).	<ul style="list-style-type: none"> • Directly and indirectly from you or an individual authorized by you. For example, from information you provide to us or from documents you provide us related to the financial services we provide; • Directly and indirectly from activity on our websites. For example, from submissions through an Edward Jones website, including Online Access, or website usage details collected automatically; and • From service providers with which we interact to provide financial services. For example, from aggregation service providers you have authorized to provide information to Edward Jones. 	<p>We may use the PI we collect for one or more of the following purposes:</p> <ul style="list-style-type: none"> • To fulfill or meet the reason you provided the information; • To contact you to discuss the services or products you receive from us or to respond to any questions or concerns you have raised; • To provide, support, personalize, and develop our websites, products, and services; • To perform services on our behalf, such as customer service or processing and fulfilling financial transactions; • To create, maintain, customize, and secure your account with us; • To verify your identity, for other fraud, crime prevention, or anti-money laundering activities, and other compliance checks and controls; • As necessary or appropriate to protect the rights, property, or safety of us, our clients, or others; • To provide you with support and to respond to your inquiries, including to investigate and address your concerns and monitor and improve our responses; • To personalize your website experience and to deliver content and product and service offerings relevant to your interests, including targeted offers and ads through our websites; • To help maintain the safety, security, and integrity of our websites, products and services, databases and other technology assets, and business; • To respond to valid law enforcement, legal, or regulatory requests and as required by applicable law, court order, or governmental regulations; • For marketing and advertising purposes; and • For testing, research, analysis, and product development, including to develop and improve our websites, products, and services. 	<p>We may share PI we collect with one or more of the following categories of entities:</p> <ul style="list-style-type: none"> • Our affiliates; • Service providers; • Third parties to whom you or your agents authorize us to disclose your personal information in connection with financial products or services we provide to you; • Governmental entities, including federal and state regulators; and • Professional advisors, including accountancy and legal firms.

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Category of Personal Information (PI)	Examples	Sources from which PI was collected	Purpose of collection	Categories of entities with which PI was shared
Commercial information	Records of personal property, products or services purchased, obtained, or considered, or other purchasing histories or tendencies.	<ul style="list-style-type: none"> • Directly and indirectly from you or an individual authorized by you. For example, from information you provide to us or from documents you provide us related to the financial services we provide; • Directly and indirectly from activity on our websites. For example, from submissions through an Edward Jones website, including Online Access, or website usage details collected automatically; and • From service providers with which we interact to provide financial services. For example, from aggregation service providers you have authorized to provide information to Edward Jones. 	<p>We may use the PI we collect for one or more of the following purposes:</p> <ul style="list-style-type: none"> • To fulfill or meet the reason you provided the information; • To contact you to discuss the services or products you receive from us or to respond to any questions or concerns you have raised; • To provide, support, personalize, and develop our websites, products, and services; • To perform services on our behalf, such as customer service or processing and fulfilling financial transactions; • To create, maintain, customize, and secure your account with us; • To verify your identity, for other fraud, crime prevention, or anti-money laundering activities, and other compliance checks and controls; • As necessary or appropriate to protect the rights, property, or safety of us, our clients, or others; • To provide you with support and to respond to your inquiries, including to investigate and address your concerns and monitor and improve our responses; • To personalize your website experience and to deliver content and product and service offerings relevant to your interests, including targeted offers and ads through our websites; • To help maintain the safety, security, and integrity of our websites, products and services, databases and other technology assets, and business; • To respond to valid law enforcement, legal, or regulatory requests and as required by applicable law, court order, or governmental regulations; • For marketing and advertising purposes; and • For testing, research, analysis, and product development, including to develop and improve our websites, products, and services. 	<p>We may share PI we collect with one or more of the following categories of entities:</p> <ul style="list-style-type: none"> • Our affiliates; • Service providers; • Third parties to whom you or your agents authorize us to disclose your personal information in connection with financial products or services we provide to you; • Governmental entities, including federal and state regulators; and • Professional advisors, including accountancy and legal firms.

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Biometric information	Genetic, physiological, behavioral, and biological characteristics, or activity patterns used to extract a template or other identifier or identifying information, such as, fingerprints, faceprints, and voiceprints, iris or retina scans, keystroke, gait, or other physical patterns, and sleep, health, or exercise data.	<ul style="list-style-type: none"> • Directly and indirectly from you or an individual authorized by you. For example, from information you provide to us or from documents you provide us related to the financial services we provide; and • From service providers with which we interact to provide financial services. For example, from aggregation service providers you have authorized to provide information to Edward Jones. 	<p>We may use the PI we collect for one or more of the following purposes:</p> <ul style="list-style-type: none"> • To contact you to discuss the services or products you receive from us or to respond to any questions or concerns you have raised; • To provide, support, personalize, and develop our websites, products, and services; • To perform services on our behalf, such as customer service or processing and fulfilling financial transactions; • To create, maintain, customize, and secure your account with us; • To verify your identity, for other fraud, crime prevention, or anti-money laundering activities, and other compliance checks and controls; • As necessary or appropriate to protect the rights, property, or safety of us, our clients, or others; and • To help maintain the safety, security, and integrity of our websites, products and services, databases and other technology assets, and business. 	<p>We may share PI we collect with one or more of the following categories of entities:</p> <ul style="list-style-type: none"> • Our affiliates; and • Service providers.

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Internet or other similar network activity	Browsing history, search history, IP addresses, information on a consumer's interaction with a website, application, or advertisement.	<ul style="list-style-type: none"> Directly and indirectly from you or an individual authorized by you. For example, from information you provide to us or from documents you provide us related to the financial services we provide; Directly and indirectly from activity on our websites. For example, from submissions through an Edward Jones website, including Online Access, or website usage details collected automatically; and From service providers with which we interact to provide financial services. For example, from aggregation service providers you have authorized to provide information to Edward Jones. 	<p>We may use the PI we collect for one or more of the following purposes:</p> <ul style="list-style-type: none"> To fulfill or meet the reason you provided the information; To contact you to discuss the services or products you receive from us or to respond to any questions or concerns you have raised; To provide, support, personalize, and develop our websites, products, and services; To perform services on our behalf, such as customer service or processing and fulfilling financial transactions; To create, maintain, customize, and secure your account with us; To verify your identity, for other fraud, crime prevention, or anti-money laundering activities, and other compliance checks and controls; As necessary or appropriate to protect the rights, property, or safety of us, our clients, or others; To provide you with support and to respond to your inquiries, including to investigate and address your concerns and monitor and improve our responses; To personalize your website experience and to deliver content and product and service offerings relevant to your interests, including targeted offers and ads through our websites; To help maintain the safety, security, and integrity of our websites, products and services, databases and other technology assets, and business; To respond to valid law enforcement, legal, or regulatory requests and as required by applicable law, court order, or governmental regulations; For marketing and advertising purposes; and For testing, research, analysis, and product development, including to develop and improve our websites, products, and services. 	<p>We may share PI we collect with one or more of the following categories of entities:</p> <ul style="list-style-type: none"> Our affiliates; Service providers; Governmental entities, including federal and state regulators; and Professional advisors, including accountancy and legal firms.

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Category of Personal Information (PI)	Examples	Sources from which PI was collected	Purpose of collection	Categories of entities with which PI was shared
Geolocation data	Physical location or movements.	<ul style="list-style-type: none"> • Directly and indirectly from you or an individual authorized by you. For example, from information you provide to us or from documents you provide us related to the financial services we provide; and • Directly and indirectly from activity on our websites. For example, from submissions through an Edward Jones website, including Online Access, or website usage details collected automatically. 	<p>We may use the PI we collect for one or more of the following purposes:</p> <ul style="list-style-type: none"> • To fulfill or meet the reason you provided the information; • To contact you to discuss the services or products you receive from us or to respond to any questions or concerns you have raised; • To provide, support, personalize, and develop our websites, products, and services; • To perform services on our behalf, such as customer service or processing and fulfilling financial transactions; • To create, maintain, customize, and secure your account with us; • To verify your identity, for other fraud, crime prevention, or anti-money laundering activities, and other compliance checks and controls; • As necessary or appropriate to protect the rights, property, or safety of us, our clients, or others; • To provide you with support and to respond to your inquiries, including to investigate and address your concerns and monitor and improve our responses; • To personalize your website experience and to deliver content and product and service offerings relevant to your interests, including targeted offers and ads through our websites; • To help maintain the safety, security, and integrity of our websites, products and services, databases and other technology assets, and business; • To respond to valid law enforcement, legal, or regulatory requests and as required by applicable law, court order, or governmental regulations; • For marketing and advertising purposes; and • For testing, research, analysis, and product development, including to develop and improve our websites, products, and services. 	<p>We may share PI we collect with one or more of the following categories of entities:</p> <ul style="list-style-type: none"> • Our affiliates; • Service providers; • Third parties to whom you or your agents authorize us to disclose your personal information in connection with financial products or services we provide to you; • Governmental entities, including federal and state regulators; and • Professional advisors, including accountancy and legal firms.

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Category of Personal Information (PI)	Examples	Sources from which PI was collected	Purpose of collection	Categories of entities with which PI was shared
Sensory data	Audio, electronic, visual, thermal, olfactory, or similar information.	<ul style="list-style-type: none"> Directly and indirectly from you or an individual authorized by you. For example, from information you provide to us. 	<p>We may use the PI we collect for one or more of the following purposes:</p> <ul style="list-style-type: none"> To fulfill or meet the reason you provided the information; To contact you to discuss the services or products you receive from us or to respond to any questions or concerns you have raised; To provide, support, personalize, and develop our websites, products, and services; To perform services on our behalf, such as customer service or processing and fulfilling financial transactions; To create, maintain, customize, and secure your account with us; To verify your identity, for other fraud, crime prevention, or anti-money laundering activities, and other compliance checks and controls; As necessary or appropriate to protect the rights, property, or safety of us, our clients, or others; To provide you with support and to respond to your inquiries, including to investigate and address your concerns and monitor and improve our responses; To personalize your website experience and to deliver content and product and service offerings relevant to your interests, including targeted offers and ads through our websites; To help maintain the safety, security, and integrity of our websites, products and services, databases and other technology assets, and business; To respond to valid law enforcement, legal, or regulatory requests and as required by applicable law, court order, or governmental regulations; For marketing and advertising purposes; and For testing, research, analysis, and product development, including to develop and improve our websites, products, and services. 	<p>We may share PI we collect with one or more of the following categories of entities:</p> <ul style="list-style-type: none"> Governmental entities, including federal and state regulators; and Professional advisors, including accountancy and legal firms.

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Professional or employment-related information	Current or past job history or performance evaluations.	<ul style="list-style-type: none"> Directly and indirectly from you or an individual authorized by you. For example, from information you provide to us or from documents you provide us related to the financial services we provide; Directly and indirectly from activity on our websites. For example, from submissions through an Edward Jones website, including Online Access, or website usage details collected automatically; and From service providers with which we interact to provide financial services. For example, from aggregation service providers you have authorized to provide information to Edward Jones. 	<p>We may use the PI we collect for one or more of the following purposes:</p> <ul style="list-style-type: none"> To fulfill or meet the reason you provided the information; To contact you to discuss the services or products you receive from us or to respond to any questions or concerns you have raised; To provide, support, personalize, and develop our websites, products, and services; To perform services on our behalf, such as customer service, processing and fulfilling financial transactions, and recruiting; To create, maintain, customize, and secure your account with us; To verify your identity, for other fraud, crime prevention, or anti-money laundering activities, and other compliance checks and controls; As necessary or appropriate to protect the rights, property, or safety of us, our clients, or others; To provide you with support and to respond to your inquiries, including to investigate and address your concerns and monitor and improve our responses; To personalize your website experience and to deliver content and product and service offerings relevant to your interests, including targeted offers and ads through our websites; To help maintain the safety, security, and integrity of our websites, products and services, databases and other technology assets, and business; To respond to valid law enforcement, legal, or regulatory requests and as required by applicable law, court order, or governmental regulations; For marketing and advertising purposes; and For testing, research, analysis, and product development, including to develop and improve our websites, products, and services. 	<p>We may share PI we collect with one or more of the following categories of entities:</p> <ul style="list-style-type: none"> Our affiliates; Service providers; Third parties to whom you or your agents authorize us to disclose your personal information in connection with financial products or services we provide to you; Governmental entities, including federal and state regulators; and Professional advisors, including accountancy and legal firms.

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Category of Personal Information (PI)	Examples	Sources from which PI was collected	Purpose of collection	Categories of entities with which PI was shared
Inferences drawn from other personal information	Profile reflecting a person's preferences, characteristics, psychological trends, predispositions, behavior, attitudes, intelligence, abilities, and aptitudes.	<ul style="list-style-type: none"> Directly and indirectly from you or an individual authorized by you. For example, from information you provide to us or from documents you provide us related to the financial services we provide; Directly and indirectly from activity on our websites. For example, from submissions through an Edward Jones website, including Online Access, or website usage details collected automatically; and From service providers with which we interact to provide financial services. For example, from aggregation service providers you have authorized to provide information to Edward Jones. 	<p>We may use the PI we collect for one or more of the following purposes:</p> <ul style="list-style-type: none"> To fulfill or meet the reason you provided the information; To contact you to discuss the services or products you receive from us or to respond to any questions or concerns you have raised; To provide, support, personalize, and develop our websites, products, and services; To perform services on our behalf, such as customer service, processing and fulfilling financial transactions, and recruiting; To create, maintain, customize, and secure your account with us; To verify your identity, for other fraud, crime prevention, or anti-money laundering activities, and other compliance checks and controls; As necessary or appropriate to protect the rights, property, or safety of us, our clients, or others; To provide you with support and to respond to your inquiries, including to investigate and address your concerns and monitor and improve our responses; To personalize your website experience and to deliver content and product and service offerings relevant to your interests, including targeted offers and ads through our websites; To help maintain the safety, security, and integrity of our websites, products and services, databases and other technology assets, and business; To respond to valid law enforcement, legal, or regulatory requests and as required by applicable law, court order, or governmental regulations; For marketing and advertising purposes; and For testing, research, analysis, and product development, including to develop and improve our websites, products, and services. 	<p>We may share PI we collect with one or more of the following categories of entities:</p> <ul style="list-style-type: none"> Our affiliates; Service providers; Third parties to whom you or your agents authorize us to disclose your personal information in connection with financial products or services we provide to you; Governmental entities, including federal and state regulators; and Professional advisors, including accountancy and legal firms.

We may also share Personal Information with any person to whom we transfer any of our rights or obligations under any agreement, or in connection with a sale, merger, or consolidation of our business or other transfer of our assets, whether voluntarily or by operation of law, or who is otherwise deemed to be our successor or transferee.

We do not grant access to your Personal Information to any other categories of third parties unless we say so in this Privacy Policy, which we may amend from time to time, or unless the law requires it.

Section 10. Your Rights Under the CCPA

a. Your Right to Know What Personal Information We Collect and Share about You. The CCPA provides California residents with specific rights regarding their Personal Information. This Section and Section 11 of this Privacy Policy describe your CCPA rights and explain how you exercise those rights.

You have the right to request that we disclose certain information to you about our collection and use of your Personal Information. We refer to these as Requests to Know. Once we receive and confirm your verifiable consumer request, we will disclose to you:

1. The categories of your Personal Information we collected.
2. The specific pieces of your Personal Information that we have collected (also called a data portability request).
3. The categories of sources from which we collected Personal Information.
4. The business or commercial purposes for which we collected or sold Personal Information.
5. The categories of third parties with which we shared Personal Information.
6. The categories of Personal Information that we have shared with service providers who provide services for us, like preparing monthly account statements.

b. Your Right to Request the Deletion of Personal Information.

Subject to certain exceptions, you have the right to request that we delete any of your Personal Information that we collected from you and retained. We call these Requests to Delete. Once we receive and confirm your verifiable consumer request, we will delete (and direct our service providers to delete) your Personal Information from our records, unless an exception applies.

We may deny your Request to Delete if retaining the information is necessary for us or our service providers to:

- Complete the transaction for which we collected the information or provide you with a product or service that you requested;
- Perform a contract we entered into with you;
- Maintain the functionality or security of our systems;
- Protect against malicious, deceptive, fraudulent, or illegal activity, or prosecute those responsible for such activities;
- Comply with or exercise rights provided by the law; or
- Use the information internally in ways that are compatible with the context in which you provided the information to us, or that are reasonably aligned with your expectations based on your relationship with us.

c. Your Right to Opt-Out of the Sale of Your Personal Information.

We do not and will not sell your Personal Information to third parties.

d. Our Support for the Exercise of Your Data Rights. We are committed to providing you control over your Personal Information. If you exercise any of these rights explained in this section of the Privacy Policy, we will not disadvantage you. You will not be denied or charged different prices or rates for goods or services or provided a different level or quality of goods or services.

Section 11. Exercising Your CCPA Rights

To exercise your CCPA rights and make a verifiable consumer request, you may click here, which will take you to a secure portal operated by our privacy software vendor, OneTrust.

Or, you may contact us toll-free at 1-855-898-6102, at which time you will be able to leave the details of your request in a secure voicemail that is checked daily.

Only you, or someone legally authorized to act on your behalf, may make a verifiable consumer request related to your Personal Information. You may also make a verifiable consumer request on behalf of your minor child. If you designate an agent to act on your behalf, you will still be required to verify your identity by providing us with certain personal information as described below. Additionally, we will also require that you provide your authorized agent with written permission to act on your behalf, and we will deny the request if the agent is unable to: (1) submit proof to us that you have authorized them to act on your behalf; or (2) provide us evidence that the agent is duly registered with the California Secretary of State.

When you make a Request to Know or a Request to Delete, we will take steps to verify your identity. These steps may include asking you for information such as your name, address, and date of birth. If we are unable to verify your identity with the degree of certainty required, we will not be able to respond to the request. We will notify you to explain the basis of any denial.

We cannot respond to your request or provide you with Personal Information if we cannot verify your identity or authority to make the request and confirm the Personal Information relates to you. In limited circumstances, we may need to contact you to obtain additional information to process your request.

We will only use Personal Information provided in a verifiable consumer request to verify your identity or authority to make the request.

Section 12. Response Timing and Format

We endeavor to respond to a verifiable consumer request within forty-five (45) days of its receipt. If we require more time (up to 90 days), we will inform you of the reason and extension period in writing.

If you provide us an email address, we will deliver our written response to you electronically at the email address you provide. If you provide only a postal address, we will respond to you via US Mail. If necessary, the response we provide will also explain the reasons we cannot comply with a request.

For data portability requests (i.e., requests for the specific pieces of Personal Information we collect about you), we have selected a format to provide your Personal Information that is readily useable and should allow you to transmit the information from one entity to another entity without hindrance, specifically Microsoft Excel format (if we respond to you electronically) or in paper format (if we respond to you via US Mail).

We do not charge a fee to process or respond to your verifiable consumer request unless it is excessive, repetitive, or manifestly unfounded. If we determine that the request warrants a fee, we will tell you why we made that decision and provide you with a cost estimate before completing your request.

Section 13. Changes to this Policy

Edward Jones reserves the right to change this Privacy Policy at our discretion and at any time. Changes are effective upon posting to this website.

For a printable version of this Privacy Policy, please [click here](#). If you require assistance in obtaining this privacy policy in another accessible alternative format, you may also call us at 1-855-898-6102.