

Edward Jones Advisory Solutions®

# Strategy. Discipline. Execution.

Do you believe your investment strategy could benefit from a more disciplined approach and extra layer of expertise? If so, now may be a good time to consider Edward Jones Advisory Solutions®. With Advisory Solutions, you can leave the daily investment decisions to a team of research analysts dedicated to making sure your portfolio adheres to your investment goals.

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## We do the hard work for you:

**Asset allocation** — Your money is diversified among different types of investments according to your risk tolerance, goals and investing timeline. Our research analysts determine the right percentages for each category based on these factors. This is called your asset allocation.

**Investment selection** — Our professionals take great care to identify and select the right mix of investments that complement one another, helping smooth the effects of market fluctuation.

**Threshold rebalancing** — Advisory Solutions employs a dynamic threshold rebalancing process to keep your asset classes in line with their original allocation. This helps keep your investments in line with your goals and risk tolerance.

**Tax-efficient management** — Our Unified Managed Account (UMA) Models use strategies designed to help you reach your financial goals with an additional goal of tax efficiency.

**Ongoing review** — Periodic reviews help ensure your investments keep pace with your needs. We keep you informed of your progress with detailed quarterly performance reports that include timely market insights.

This approach allows you to spend less time managing your investments, while making sure you have a disciplined approach in place.

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**For more information about how Advisory Solutions can help you reach your long-term financial goals, talk with your financial advisor today.**

Edward Jones is a dually registered broker-dealer and investment adviser. Edward Jones Advisory Solutions® is a wrap fee program that provides investment advisory services. Depending on a client's minimum investment, a client can select Fund Models, which invest in affiliated mutual funds (if available), unaffiliated mutual funds and exchange-traded funds (ETFs), or UMA Models, which also include separately managed accounts (SMAs). Please review the applicable Edward Jones Advisory Solutions Brochure for more information.

Many of the investments in Advisory Solutions are offered by prospectus. You should consider the investment objective, risks, and charges and expenses carefully before investing. The prospectus contains this and other information. Your Edward Jones financial advisor can provide a prospectus, which you should read carefully before investing.

All investment strategies and investments involve risk, and the value of your account will fluctuate. As a result, your account may be worth more or less than the amount of money you invested in Advisory Solutions. Each Program Fund will also fluctuate in value and, when sold, may be worth more or less than the original cost to purchase.

The initial minimum investment in Advisory Solutions is \$25,000. For UMA Models investing in a Balanced Growth & Income, Balanced toward Growth, Growth Focus or All Equity Focus portfolio objective, including Custom Models containing SMAs, the initial minimum investment amount is \$300,000, with additional options available at \$500,000 and \$1 million. For UMA Models investing in an Income Focus or Balanced toward Income portfolio objective, including Custom Models containing SMAs, the initial investment minimum is \$500,000, with additional options available at \$1 million.

Rebalancing an Advisory Solutions account may result in a taxable event. Please contact your tax professional regarding your situation. Automatic rebalancing and asset allocation do not guarantee a profit or protect against loss.