

# **Important changes to your account** and Regulation Best Interest disclosure

Keeping you informed is an important part of how we work together. The purpose of this notice is to make sure you are aware of some changes to your account.

As you may have heard, the Securities and Exchange Commission has released new rules that go into effect on June 30, 2020. The rules require broker-dealers to operate under a new best interest standard of conduct. While these rules require us to make some changes to your account, at Edward Jones putting your interests first has always been at the heart of our business.

As part of the new rules, we've enclosed a new disclosure document called "Important Information About Our Brokerage Services." This disclosure contains important information about how we serve brokerage accounts. If you have any questions after reviewing this disclosure, please contact your financial advisor.

We've also amended your Edward Jones Account Agreement to reflect important changes we've made to your account to comply with the new rules, and we're changing the name of your account to the Edward Jones Select Account. You'll find a summary of the changes to your account agreement below. You can view the full amended agreement at [edwardjones.com/disclosures](http://edwardjones.com/disclosures) or request a copy from your financial advisor.

### **Summary of Amendments to Your Edward Jones Account Agreement**

Effective June 20, 2020

- We have added a "Client Information and Portfolio Objective" section to provide details on how your Client Profile and Account Portfolio Objective are used to provide advice on your account.
- In the "Terms of Account Maintenance" section, we have added language to:
  - Explain what investments can be held and purchased in your account
  - Explain how proxies will be voted
- The "Systematic Transactions" section has been updated to clarify how "orphaned fractional shares" are handled.

### **Action Required**

Finally, one of the primary ways your financial advisor puts your interests first is by relying on the important information you have provided to Edward Jones. This information will be maintained in a Client Profile, which your financial advisor will use to provide advice and guidance for this account specific to your investing time horizon, risk tolerance and whatever Portfolio Objective you'd like to assign to this account. If you haven't already done so, please contact your financial advisor to schedule a review of this account and select a Portfolio Objective to guide our investment recommendations to you. As of June 20, 2020, you will not be permitted to purchase new investments for this account until you assign a Portfolio Objective to it.

As always, you'll continue to have a dedicated and accessible team who knows you, works with you to help achieve your goals, and puts your interests first.

***Note: If you have more than one impacted account, you will receive a separate notice for each account.***

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