

# **Important changes to your Select Retirement 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 IRA Custodial Agreement to reflect important changes we've made to your account to comply with the new rules. You'll find a summary of the changes to your account agreement below. You can view the full amended agreement at [edwardjones.com/disclosures](https://edwardjones.com/disclosures) or request a copy from your financial advisor.

### **Summary of Amendments to Your Edward Jones IRA Custodial Agreement**

Effective June 20, 2020

- We have updated the "Client Information and Portfolio Objective" section to provide updated details on how your Client Profile is used to recommend an Account Portfolio Objective and how this information is used to provide advice on your account.
- The "Systematic Transactions" section has been updated to clarify how "orphaned fractional shares" are handled.

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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