

### The Financial Advisor Career Development Program

The Edward Jones Financial Advisor Career Development (FACD) program is a nine-month experience of industry-leading training and coaching that prepares candidates for their career as a Financial Advisor. Through the training, individuals with three years or less of professional experience are given an opportunity to develop the knowledge, skills and behaviors necessary to build a successful practice as a Financial Advisor at Edward Jones.

### Overview of the in-market FACD program

Edward Jones has developed a version of the FACD program that will enable participants to experience their training while remaining in their selected geographic destination (relocation is not required). Many elements of the in-market FACD program will reflect the same training and experiences provided through the on-campus FACD program. The program will explore a residency style model where the trainee will be hosted by a branch team and will be challenged to learn and apply in a real world setting.

| Activity Detail       | Timeframe | Description  |
|-----------------------|-----------|--|
| Onboarding            | 12 weeks  | Onboarding and study begins  |
| Know Your Customer    | 1 week    | 5 Day course in St Louis   |
| Essentials Training   | 6 weeks   | Introduction to behaviors, investment knowledge and tools                      |
| Essentials HQ Course  | 1 week    | 5 Day course in St Louis   |
| Client Needs Training | 12 weeks  | Provides framework for solutions and tools used to help solve long terms goals |
| Field Preparation     | 5 weeks   | Preparing to enter the field   |
| Field Prep HQ Course  | 1 week    | 5 Day course in St Louis   |

### Benefits of the in-market FACD program

- Develop an understanding of the five client needs and the solutions-based approach to solving those needs.
- Deepen knowledge of the unique needs of the community through market research and community engagement.
- Begin the client creation process through building a strong pipeline and participating in purposeful networking activities.
- Gain experiential learning and application, while adding value and providing support to host branch/clients

### Frequently Asked Questions

#### What are the requirements for participation in the in-market program?

- Considerations include the amount and type of past experience, level of education and degree path, among other potential qualifications. Individuals that are asked to participate should have selected the market where they plan to build their practice.

#### Will the individuals that are asked to participate in the in-market program be required to do so?

- No. Candidates who do not wish to experience their training with the offered in-market class will be permitted to join a scheduled class at a headquarters campus location. The timing and specific HQ location of these classes is dependent upon availability.

#### Where will the training take place?

- Following industry registration exams participants will work from an assigned host branch location with the exception of attending three 5 day training courses at a headquarters campus location. Travel and accommodations during these sessions will be provided by the firm.

#### What flexibility does the training provide for taking time off?

- The nine months of training is an intense period of development with very little flexibility for time off. As a result, paid time off is not provided. While sicknesses do happen, these days must be taken unpaid. Vacations taken during the program would be unpaid and will likely not be approved.

