

Purpose in Action

2023 Purpose, Inclusion and Citizenship Report

At Edward Jones, our purpose is to partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society. Our fifth annual Purpose, Inclusion and Citizenship Report, Purpose in Action, highlights some of the many ways we brought our purpose to life in 2022.

Our approach as a firm is to address some of the most pressing challenges of our time in three areas, our Purpose Impact Areas: Partnering for Lasting Financial Strength, Promoting Healthier Futures and Advancing Inclusive Growth. These Purpose Impact Areas are an extension of our firm's purpose and serve as a framework to guide our strategic business decisions, investments and activities, as outlined in the Report, and enable us to measure our progress in making a positive impact on society.

Partnering for Lasting Financial Strength

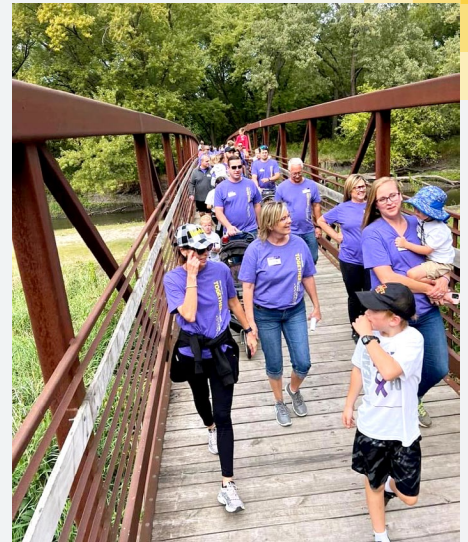
We believe in the power of financial knowledge and a personal, needs-based approach to build long-lasting financial strength. That's why we create deep relationships and provide tailored resources to educate and support people in seeking to create intergenerational wealth for themselves and those around them. This extends beyond our work with our more than 8 million clients to include our Edward Jones Financial Fitness program, which has helped nearly 450,000 learners increase their financial literacy since 2020. And, it includes the work of the Grassroots Task Force, our voice for the individual investor in our nation's capital. In 2022, the Grassroots Task Force was a leading advocacy voice for the bipartisan SECURE 2.0 retirement savings legislation. The passage of SECURE 2.0 will extend and expand savings opportunities and help millions more Americans achieve a secure and dignified retirement.

Promoting Healthier Futures

We believe pervasive health issues stand in the way of people building, maintaining and enjoying wealth in life. That's why we work to promote the financial and emotional well-being of those impacted by health issues, so each person can live an enriching life. For us, this starts with taking care of our own, focusing on associate health and wellness, as well as talent development and retention, and also comes to life through caring for our communities and our environment.

Advancing Inclusive Growth

We believe every person deserves the opportunity to thrive — regardless of where they start. That's why we invest to lift all people and communities, including the underserved, by equipping more people to fully participate in the economy and build the future they want. We strive to be a place of belonging where our systems and processes embed diversity, equity and inclusion throughout our firm, and where individuals are respected, valued and met with the necessary resources to reach their individual potential.



Our commitment is to leave people and places better than we found them. To learn more about the impact our approximately 52,000 associates are making in more than 3,000 communities across North America, download the full report at edwardjones.com/purposeinaction.

Our purpose in action: 2022 at a glance

**More than
\$34.3 million**

contributed through corporate, Edward Jones Foundation and associate philanthropic support to 319 organizations

\$1 billion

investment planned in 2022 in technology infrastructure, digital initiatives, virtual enablement tools and test-and-learn pilot programs

\$14.6 billion

in assets under care in 529 plans, No. 1 in the industry based on new investments, and No. 2 in the industry based on assets under care (as of Dec. 31, 2021)

**Nearly
\$350 million**

invested by clients in the Edward Jones Charitable Gift Fund, with more than \$57 million granted to charities

**Nearly
450,000**

learners reached in person and online through Edward Jones Financial Fitness educational programs — including more than 60,000 high school students — since the program began in 2020

**Nearly
58,000**

total number of Day of Caring volunteer hours

**Nearly
\$200,000**

in disaster relief assistance distributed to 40 associates and families from associate, retiree and Edward Jones Foundation contributions

Served more than
**8 million
clients**

across North America

**11,250
trees**

planted with the Arbor Day Foundation

\$39 million

contributed through corporate giving and associate walks since 2016 to support the Alzheimer's Association® and the fight to end Alzheimer's disease

**3 Community
Courageous
Conversations**

addressing diversity, equity and inclusion topics

**12 Business
Resource
Groups**

promoting diversity, equity and inclusion