

Purpose in **Action**

Edward Jones 2023 Purpose, Inclusion and Citizenship Report

Our purpose: To partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society.

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VOLUNTEER

About this report

Edward Jones is a leading financial services firm in the U.S. and through its affiliate in Canada. As of Dec. 31, 2022, the firm's nearly 19,000 financial advisors served more than 8 million clients with \$1.6 trillion in client assets under care. Edward Jones' purpose is to partner for positive impact to improve the lives of its clients and colleagues, and together, better our communities and society. Through the dedication of the firm's approximately 52,000 associates and our branch presence in 68% of U.S. counties, the firm is committed to helping more people achieve financially what is most important to them. The Edward Jones website is [edwardjones.com](https://www.edwardjones.com) and its recruiting website is careers.edwardjones.com. Member SIPC.

This Purpose, Inclusion and Citizenship Report highlights the many ways Edward Jones brought its purpose to life during 2022. In its fifth installment, the report reflects the achievements of the firm's associates throughout North America in pursuit of its purpose and business focus.



Partnership is embedded throughout our rich history, and it's one of the many ways we recognize the contributions of our associates and invest in our firm's future.

A letter from **Penny Pennington**

Welcome to our 2023 Purpose, Inclusion and Citizenship Report: Purpose in Action

At Edward Jones, we are guided by our purpose: to partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society. It's an ambitious purpose, and it's one that is deeply rooted in helping every client and community where we live and work to thrive. It often comes to life through deeply understanding the needs of our stakeholders and knowing how to bring people and resources together to improve the well-being of the clients, colleagues and communities we serve.

Last year, our firm celebrated its 100th anniversary — a remarkable achievement about which we are very proud. It was the celebration not only of a milestone but what that milestone represents. The millions of lives we impacted during those first 100 years in business, the many goals we helped families reach, the thousands of associates who have had the opportunity to lead professional lives of significance — it's incredible to think about. As we continue through the early days of our second century, we look forward to growing that impact exponentially.

In addition to our Centennial, we marked another important milestone for our firm in 2022 — our 18th limited partnership offering, and our largest ever. Our partnership — in its spirit and the way we invest — allows us to put our clients' interests first, and we are proud that more than 30,000 of our colleagues and retired colleagues are now owners of our firm. Partnership is embedded throughout our rich history, and it's one of the many ways we recognize the contributions of our associates and invest in our firm's future.

Our approach as a firm is to address some of the most pressing challenges of our time in three areas, our Purpose Impact Areas, where our expertise as well as the passions of our colleagues can make the greatest difference. The first of those areas is **Partnering for Lasting Financial Strength**. We want people to achieve what's most important to them, and we believe the keys to their success lie in helping to grow financial knowledge and build long-lasting financial resilience.

Continued on next page >

Nearly 19,000 financial advisors and 24,000 full-time and part-time branch team support members serve the firm's more than 8 million clients across North America every day to help them reach their financial goals.

In 2022, we announced a significant investment in our financial advisors and other colleagues, technology infrastructure, digital initiatives, virtual enablement tools, strategic relationships and test-and-learn pilot programs, as well as teaming options designed to allow branch teams more flexibility and choice, all in the interest of empowering our branch teams to serve clients more deeply.

We believe the financial services industry historically has not been built for all, but instead tended toward serving only the wealthiest percentage of the population. As a firm, we seek to change that by serving more Americans and helping them achieve more possibilities in their lives. We take a holistic approach to financial well-being that includes education, products and services that help people get ahead and pass down that prosperity for generations.

Beyond our work with clients, our Edward Jones Financial Fitness initiative — the first step toward building financial resilience — has helped nearly 450,000 learners increase their financial literacy since 2020.

We also are **Promoting Healthier Futures**, so more people can live enriching lives. Too often, we have seen the impact that pervasive health issues can have on families' ability to build, maintain and enjoy financial well-being. It's one reason we've been the National Presenting Sponsor for the Alzheimer's Association Walk to End Alzheimer's® since 2016 and have pledged to raise \$50 million for the fight to end Alzheimer's disease by the end of 2025.

We also promote healthier futures through our history of environmental stewardship and our support for the choices our clients make to invest according to their values and desires. And we're giving clients the opportunity to leave a legacy of their own through donor-advised funds (DAFs), which allow more donated dollars to reach nonprofits doing crucial work.

Finally, we believe in **Advancing Inclusive Growth** because everyone deserves the opportunity to thrive personally and professionally. Our unwavering support for diversity, equity and inclusion comes to life on many different fronts. We've shared publicly our five-point commitment to end racism and positively impact underrepresented populations. This includes goals toward greater representation of women and people of color among our U.S. and Canadian colleagues. We recognize that fostering prosperity for everyone begins within our own walls.

We also stay involved and invested in our local communities to promote economic prosperity for more people, assessing the direct and indirect impacts we're making on the economy. One example from our hometown includes our work with the St. Louis Anchor Action Network. Together with other key partner organizations, we're committed to advancing racial equity, removing barriers to economic opportunity and creating a more inclusive regional community.

Edward Jones has been deeply invested in our clients, colleagues and communities for 100 years. We're an integral part of the more than 3,000 communities in North America we serve. Keeping our communities thriving enables more people to invest in their long-term futures and creates long-term financial resilience for communities and society. Our focus on the well-being of our clients and our communities is something we'll always keep at the forefront of what we do. Our commitment is to leave people and places better than we found them.

Together, we are making a difference.



Penny Pennington,
Managing Partner, Edward Jones

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)¹

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

Activating our **purpose**

For more than 100 years, Edward Jones has partnered with its clients, colleagues and communities to make a meaningful impact. Setting our sights and ambitions on the next century, Edward Jones will continue to create value for those we currently serve, as well as pursue the opportunity to grow our reach more intentionally.

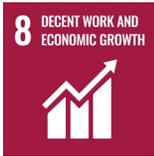
In 2022, we conducted an assessment to identify and prioritize the issues that are most important to our stakeholders, including our clients, colleagues and communities. This assessment reinforced our commitments of Partnering for Lasting Financial Strength, Promoting Healthier Futures and Advancing 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 this report, and enable Edward Jones to measure our progress in making a positive impact on society.

As a firm, we are careful and thoughtful about our approach, taking time to understand what matters most to our stakeholders and establish baselines before setting targets.

The annual Purpose, Inclusion and Citizenship Report has been developed with universal frameworks in mind, such as the United Nations Sustainable Development Goals (SDGs) and Global Reporting Initiative (GRI), allowing the firm to share our progress and challenges as we continue along our journey.

Our purpose: To partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society.

Purpose Impact Areas	United Nations Sustainable Development Goals	Edward Jones’ focus*
<p>Partnering for Lasting Financial Strength</p>	 	<ul style="list-style-type: none"> • Meeting our clients’ needs • Protecting client data • Governing our firm • Developing our colleagues • Contributing to the economy • Improving our communities’ resilience
<p>Promoting Healthier Futures</p>	 	<ul style="list-style-type: none"> • Offering our clients investments with impact • Supporting our colleagues’ well-being • Improving community health • Protecting the environment
<p>Advancing Inclusive Growth</p>	 	<ul style="list-style-type: none"> • Representing diversity and inclusiveness • Supporting community equity and equality • Educating communities

*Based on feedback from our clients, colleagues, communities and others as part of a 2022 materiality assessment.

100 years of purpose in action

Edward Jones turned 100 on Jan. 28, 2022, marking a century of serving clients, colleagues and communities, continuously growing and evolving to become the successful firm it is today. We celebrated with a series of events and service projects honoring those who have made this milestone possible. Each event demonstrated the many ways we're putting our purpose into action, honoring our past and looking forward to the growth of our impact, all while continuing to reinforce and strengthen our culture.



In September 2022, marking the start of the Alzheimer's Association Walk to End Alzheimer's® season, Edward Jones Managing Partner Penny Pennington and other firm leaders met in Orlando, Fla., with representatives from the Alzheimer's Association® and local families living with the disease. The discussion centered on how we partner to broaden awareness, fund research and increase educational opportunities to advance care and support for families impacted by Alzheimer's disease.



In celebration of our Centennial, Ariz. branches and our Tempe home office set a goal of collecting 100,000 pounds of food through the annual Edward Jones Bag-a-Thon. Donations were packaged and delivered to the United Food Bank and Tempe Community Action Agency.



As part of the Dallas Centennial Celebration, Edward Jones associates, clients and friends assembled 1,000 hygiene kits for children served through Community Partners of Dallas. A nonprofit supporting the work of Child Protective Services, Community Partners of Dallas provides for the immediate and urgent needs of children who are abused and neglected in Dallas County and supports case workers.



Nearly 19,000 financial advisors and 24,000 full-time and part-time branch team support members serve the firm's more than 8 million clients across North America every day to help them reach their financial goals.

Compounding our **time**, **treasure** and **talent**

Giving back to our communities has, and will continue to be, a core part of who we are. Efforts span our three Purpose Impact Areas and include contributions of time and dollars.

In 2022, we contributed more than \$34.3 million through corporate, Edward Jones Foundation and associate philanthropic support to 319 organizations representing a wide variety of causes. In addition to this critical financial support, more than 10,000 associates served more than 15,000 community organizations across North America. We anticipate giving approximately \$200 million between 2020 and the end of 2025 in communities we serve throughout the U.S. and Canada.

As a part of that goal — \$200 million between 2020 and the end of 2025 — we plan to build on our legacy of community engagement in the St. Louis region, our hometown for more than 100 years. We anticipate \$80 million in philanthropic giving in the greater St. Louis region toward inclusive economic growth and community health and well-being. Our goal is to create a model of impact that can be replicated in other communities we call home.



More than **\$34.3 million**

in corporate, Edward Jones Foundation and associate giving contributed to 319 unique organizations in the following categories:

- 55%** Health & Social Services
- 25%** Community & Economic Development
- 10%** Education, K-12
- 5%** Education, Higher
- 4%** Culture & Arts
- 1%** Environment

One of the many ways we bring our purpose to life is through our annual **Core Cause** campaign supporting the **United Way**.

Also celebrating a century of impact in 2022, the United Way of Greater St. Louis works to create a stronger, healthier and more equitable community for all.

Edward Jones
REGION
326

Nearly \$8.5 million

raised through firm match and individual associate and retiree contributions to benefit the greater Phoenix and St. Louis communities

15 barrels

of food collected to serve our community through the St. Louis Area Foodbank

150 items

(men's and women's suits, slacks, shoes and accessories) gathered in support of Employment Connection of St. Louis

19 boxes

of clothing items donated to benefit local people in need

280 hours

from 45 associates who participated in our Days of Caring events in August 2022 in St. Louis and Tempe

10,647 volunteer hours

completed by associates to help the United Way in St. Louis

3,084 pounds

of nonperishable food collected during the St. Louis Centennial Celebration

\$531,357

contributed by 101 firm retirees, accounting for 13% of individual contributions

Associates in **action**

Caring for people in need extends far beyond the branch — sometimes even the country — for many associates across our firm.

A critical mission

When financial advisor Chris Zimmerman of Moline, Ill., was contacted last year by a missionary friend in Côte d'Ivoire, Africa, he couldn't have predicted the profound journey he was about to undertake. After hearing the story of a toddler who fell into a fire, suffering severe burns throughout her body, Zimmerman quickly put together a plan to help her and her mother, neither of whom had ever left their village or speak any English. He credits his relationships and connections across the country with helping bring this family to the U.S. But it was Christopher and his wife, Juliann, who went above and beyond, opening their home to the family for nearly seven months so the little girl could get the medical care she needed.

Angel Flight

Financial advisor Leland Brockman, Lubbock, Texas, has turned his passion into purpose by donating his free time — and flight time — to patients in need through an organization called Angel Flight. Brockman has turned his lifelong love of flying into an opportunity to help people seeking needed medical treatments in New Mexico, Texas and Oklahoma.



Moving Day

Financial advisor Craig Miyamoto, of Woodland, Calif., understands the impact of Parkinson's disease firsthand, because his mother has been living with it for more than 20 years. Recently, Miyamoto and other financial advisors came together to help grow Moving Day, a Walk for Parkinson's, in Sacramento, and have grown the national efforts as well, creating a National Team on behalf of Edward Jones.

We're 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 Purpose Impact Area includes our work to build financial autonomy and resilience, enterprise cybersecurity and data stewardship, client protection and privacy, and comprehensive client relationships and experiences. Initiatives aligned with partnering for lasting financial strength support Goal 4: Quality Education and Goal 8: Decent Work and Economic Growth of the United Nations Sustainable Development Goals.



Welcome from Ken Cella

Principal, Branch Development

At Edward Jones, we are on a multi-year journey of transformation, one that is geared toward serving our clients more completely through deep personal relationships and comprehensive planning and advice.

We serve more than 8 million clients today, and we believe there are as many as 40 million households in North America that could benefit from the value we provide. Our commitment is to grow the impact we're able to make — an impact that is deeply connected to our purpose and rooted in our competitive differentiators:

- We are experience-led
- We are a partnership — we control our own destiny
- We are built on relationships and invest deeply in them
- We are hyperlocal and integral to our communities
- We operate under a set of four core values

Our clients' interests always come first, but we can't properly serve our clients without first taking care of our financial advisors and branch teams. We continue to invest in more ways to listen and learn from them. And, to better serve them, we're providing new forms of flexibility, autonomy and choice, giving branch teams more options so they can serve our clients as they prefer.

For example, this year we announced our plans for teaming options for our nearly 19,000 financial advisors and their branch team support members. In select markets, the firm is currently piloting a multi-financial-advisor model in which three to six financial advisors share office space. This is in addition to the models we're testing that allow for the expansion of branch support roles.

This spirit of innovation is present in the products and services we provide our clients as well. We've recently unveiled enhancements to our **Online Access, sustainable investing** opportunities, the **Edward Jones Charitable Gift Fund** and more — each of which is detailed in this report and aligned with our purpose.

Ultimately, the transformation journey we're on is a reflection of our commitment to our clients. We will always put our clients and their interests first. That approach has been central to our firm for over a century, and it will continue to be — through our second century and beyond.

Investing in our branch teams and clients

In 2022, we began accelerating our journey and aspiration to serve clients more completely through deep personal relationships and comprehensive planning and advice. Throughout the firm, we're looking to advance our purpose and make a greater impact by providing personalized experiences, guidance and tools designed to help more people achieve financially what is most important to them.

To that end, in 2022 we announced an investment of \$1 billion in technology infrastructure, digital initiatives, virtual enablement tools and a variety of test-and-learn pilot programs designed to grow our impact and deepen client and financial advisor relationships. Edward Jones financial advisors throughout the U.S. and Canada are currently piloting new prototypes that may be scaled to our nearly 19,000 financial advisors and more than 8 million clients across North America.

We are working to expand our current advice and guidance into a more holistic advice and life planning capability to enable our financial advisors to meet all the pillars our clients are looking for, including health, family, purpose and finances.



Creating opportunities for growth

For Barbie Bailey of Magnolia, Ark., stepping into the role of registered branch associate in 2022 after more than 15 years with the firm as a branch office administrator was a way of fulfilling her personal purpose — “to make every interaction with every client positively impactful for our client and our future.”

Driven by seeing the need for additional capacity to serve current and prospective clients, Barbie credits her previous region leadership experience and the support of her financial advisor, Laura Crowell, with preparing her for her new role.

“For me, this is about having the opportunity to more deeply serve our clients. I’ve had a heart for that since I started working with Laura, and she has been very supportive and encouraging. I really love our clients, and being able to take on more interaction with them to support their goals and the evolution of our branch is exciting.”



**Training Magazine,
Apex Awards¹, ranked
No. 24 in 2022**

**J.D. Power 2022 U.S.
Financial Advisor Satisfaction
Study^{SM2}, ranked highest
in 2022 for the 13th time**

**People Companies That Care³,
ranked No. 37 in 2022**

¹2022 Training Magazine Training Apex Award, published March 2022, data as of September 2021, an application fee was required for consideration.

²2022 Training Magazine Training Apex Award, published March 2022, data as of September 2021, an application fee was required for consideration.

³2022 People Companies Who Care, published August 2022, Great Places to Work, data as of August 2021. Compensation provided for using, not obtaining, the rating.



Expanding branch support

Roles have been created and expanded to better support our branch teams and serve clients. By the end of 2022, our firm had 200 registered branch associates (RBAs), with an additional 500 in the training process. RBAs must be fully licensed (Series 7 and 66) before joining the training program, which includes six weeks of immersive onboarding. Following completion of the training program, RBAs support financial advisors with their existing client base, partnering together to meet evolving client needs.

In my role as a financial advisor, it's critical to understand what's important to each of my clients, whether they're Millennials or retirees. Together, we navigate through things like market volatility to focus on the long term."

Jon Derby
Financial Advisor
Coburg, Ore.

Teaming up for a better client experience

To offer more flexibility, autonomy and choice to our financial advisors, we've announced teaming options that provide new and familiar industry-leading ways branch teams can help individual investors achieve financially what is most important to them.

In 2022, we opened 170 multi-financial-advisor offices. By the end of 2023, we plan for more Edward Jones financial advisors to have the option to share a branch office with another financial advisor while maintaining individual client relationships. The firm is currently piloting a multi-financial-advisor model in which three to six financial advisors share office space. These new teaming options will deliver on Edward Jones' commitment to meet the diverse needs of financial advisors, empowering them to best serve clients and investors, and contribute to reducing our real estate footprint and environmental impact.

In addition, the firm is testing models that would allow for the expansion of branch support roles.

Evolving the branch team model

In more than 30 years with Edward Jones, financial advisor Dave Schreiber of Longmont, Colo., has seen a great deal of change, including recent opportunities to evolve the firm's branch team model. As a part of one of the firm's first multi-financial-advisor team offices, Dave works alongside two other financial advisors, Liz Bleidt and Samantha Schreiber-Reed; a senior branch office administrator, Judy Meduna; a branch office administrator, Joanna P. Halle; and an on-call branch office administrator, Angela M. Sargent.

"As a team, we're able to provide clients with enhanced client service, different perspectives and experience, and even greater accessibility. And, as a branch, we're able to meet and serve more clients each day. It's a win-win."



Edward Jones economic impact

With a presence in 68% of the counties in the U.S., Edward Jones' home offices and more than 15,000 branch locations have a tremendous impact on national and local economies in the U.S. and Canada. In our recent economic impact assessment¹, we estimate that in 2021:

141,491 jobs were supported by Edward Jones in the U.S. and Canadian markets, translating into \$15.3B of labor income. This labor income, together with indirect taxes and other income from Edward Jones' business, contributed \$20B to our nations' Gross Domestic Product (\$19.5B in the U.S. and \$0.5B in Canada).

For every job
Edward Jones directly
creates as an
employer, another
1.6 jobs
are created in
the community

\$1.2 billion
was directly contributed by
Edward Jones to our suppliers
for goods and services
within the region in
which we operate

Protecting privacy and security

While threats to personal data and digital infrastructure remain at an all-time high, so does Edward Jones' commitment to maintaining a robust system of controls to secure the data privacy of our clients and colleagues. We have extensive **privacy practices, screening processes, fraud prevention**, system testing, assistance and security training in place to keep private information secure and confidential.

The firm has dedicated financial crime prevention, privacy and digital security teams focused on monitoring for current and future threats, and our home office associates and branch teams receive regular training on cybersecurity, privacy protection, and fraud detection and prevention.

Efforts include:

- 24/7/365 monitoring of systems and information
- Restricted access to sensitive information
- Regulatory compliance with strict security standards
- Digital access controls, including the use of multifactor authentication and data encryption
- Physical access controls, such as badged access to home office real estate
- Performing due diligence and monitoring on service providers that process or store personal information
- System protections, such as firewalls, intrusion detection/prevention systems and vulnerability management
- Ethics program including culture of compliance symposia

**1,372 total senior client
protection cases in 2022,**
up from 726 cases in 2021

While we have significant technological controls in cybersecurity and privacy, one of the strongest defenses against phishing and social-engineering schemes remains the branches themselves. Our branch-office model provides a personal, face-to-face approach that helps us identify unusual behavior or activity, particularly with elder financial abuse.

The Security Industry/Financial Market Association (SIFMA), a not-for-profit trade association representing securities brokerage firms, investment banking institutions and other investment firms, reports that senior financial exploitation has been estimated to cost almost \$3 billion per year in cases that have been reported by the media. It has been estimated that only 1 in 44 cases is ever reported to the authorities.² Moreover, recent scientific advancements have shown that financial decision-making is often one of the first cognitive functions to decline — even high-functioning adults can develop this vulnerability as part of the normal aging process.

Edward Jones is committed to supporting our clients' changing needs as they age. We strive to maximize our senior clients' potential to achieve their financial goals and use or preserve their wealth in a manner consistent with their wishes.

In response to the growing threats and complexity of matters facing this population, the firm has established a new team in Field Supervision fully dedicated to senior client protection. This group works in partnership with internal stakeholders, such as the firm's Legal and Fraud Investigation departments, as well as external community-based resources, such as Adult Protective Services (APS) and law enforcement agencies, to protect our senior clients. Leaders from this group regularly engage with SIFMA and regulators to share best practices and collaborate on future strategies to strengthen senior client protection across the industry.



Making education more **affordable**

2022 marked 20 years since Edward Jones first began offering 529 plans to help parents, grandparents and other family or friends save for loved ones' college education costs. Today, Edward Jones offers 21 plans for 529s, and its clients have \$14.6 billion invested in them.⁴

Despite the convenience of opening a 529 plan to help with college and other education-related expenses, awareness of these plans remains relatively low. Our annual survey of adults in the United States revealed that only 2 in 5 (40%) respondents recognized 529 plans as an education savings tool. Fifty-one percent of respondents said they either didn't know or could not answer the question.

Even as they weathered a pandemic and rising inflation, a majority of respondents (55%) said the current socioeconomic conditions in the country have not changed their opinions on the importance of saving for higher education — a slight uptick from the 2021 survey, when 51% expressed the same opinion.

At Edward Jones, our financial advisors discuss evolving financial priorities with clients, including, for example, saving for education through various investment vehicles, such as a 529 plan.



Learn more about 529 education savings plans.

Advocating for a secure retirement

The Grassroots Task Force is our voice for the individual investor in our nation's capital. It is the securities industry's only volunteer advocacy organization that travels to Washington, D.C., to speak on policy issues of importance to individual investors. The Grassroots Task Force is composed of financial advisor and branch team support member chairs in all 50 states who foster relationships with and educate elected officials to ensure they understand how legislative and regulatory proposals could impact individual investors.

In 2022, the Grassroots Task Force was a leading advocacy voice for the bipartisan SECURE 2.0 retirement savings legislation. The Task Force led a firmwide mobilization that resulted in more than 8,200 associates sending over 27,000 letters to Capitol Hill. The passage of SECURE 2.0 will extend and expand savings opportunities and help millions more Americans achieve a secure and dignified retirement.

**Ranked No. 1
in the industry**

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

**21
529 plans**
available to clients

\$14.6 billion
in client assets under
care in 529 plans



Building financial resilience

As a firm, we believe financial advice and education are important for everyone, and work with a wide range of investors, including those just getting started, to help people achieve what is most important to them. Our efforts extend beyond our clients and associates as we work to help build financial strength and resilience and to empower equitable growth in the communities we serve.

One way we do that is by helping grow financial knowledge and building long-lasting financial strength. In collaboration with EVERFI, we launched our Edward Jones Financial Fitness program in 2020. Providing guidance and tools to families in the U.S., the program seeks to raise their confidence in their ability to achieve greater possibilities in their lives.

The financial content included in the program meets all state and federal education requirements. Since launching the program, our in-school programming, combined with a free digital education platform available on our website, has reached nearly 450,000 learners — nearly halfway toward our goal to reach 1 million learners by the end of 2025.

In addition, we also advocate for financial education in Washington, D.C. Our Grassroots Task Force meets regularly with U.S. legislators to serve as a voice for individual investors, and one of the topics they discuss is the use of financial education to build a stable financial future for more Americans.

 Access free financial education on a range of topics, from creating a budget to buying a home.

Helping clients make a lasting impact

The Edward Jones Charitable Gift Fund is helping clients leave a legacy through **donor-advised funds (DAFs)**. A DAF is a charitable giving tool that allows clients to make an irrevocable contribution to a fund and receive an immediate tax deduction.³

Over time, clients can make a lasting impact by requesting grants be made to 501(c)(3) public charities. A DAF can be a powerful tool for maximizing charitable impact, helping clients invest their contributions and grow their charitable gifts over time, tax free.

In 2022:

Nearly \$350 million

invested by Edward Jones clients in the Edward Jones Charitable Gift Fund

More than \$57 million

granted to charities supporting causes and communities, advised by donors' recommendations



HRC Corporate Equality Index, perfect score

2022 Best Places to Work For LGBTQ+ Equality, Great Place to Work® in partnership with Human Rights Campaign Foundation, published Equity Magazine January 2022, data as of July 2021. Compensation provided for using, not obtaining, the rating.

2022 Edward Jones Financial Fitness by the numbers:

Our efforts extend beyond our clients and associates as we work to help build financial strength and resilience and to empower equitable growth in the communities we serve.

32,215
high school
students
engaged

63%
of high school students
report financial confidence
and are "likely" or "very
likely" to invest in the future
after completing the course

593
high
schools

38,459
online
learners

54%
high-need
schools

54%
of high school students
feel prepared upon course
completion to accomplish
long-term financial goals,
an indicator of greater
financial resilience

A Spirit of **Caring**

Yukiko Bivens of Monticello, Ark.

Edward Jones associates share a commitment to building financial resilience, and for Yukiko Bivens, it's a mission that extends far beyond the walls of her office. Bivens, a Japanese immigrant, moved to Monticello, Ark., in 2003 and immediately fell in love with the community. Monticello is where she raised her daughter and transformed her career into one where she can make a lasting impact in all parts of the community.

In 2021, however, she received the heartbreaking news of the passing of her dear colleague, financial advisor William Busby. In a time of chaos, she knew she needed to be there for their clients. Yukiko shares: "That Monday morning, I came in, I reached out to every client. I just wanted to be an anchor for our clients and to let them know I was there if they needed anything."

With encouragement from her colleagues, she is studying to become a registered branch associate — a newly formed role at Edward Jones — to more deeply serve her clients and community.

The economic health of Monticello remains her top priority, and she devotes her time to providing mental health resources for people in need. For Yukiko, addressing the mental health needs of the community is the first step to improving financial strength. Financial literacy is even part of her role as an instructor of Japanese language and culture at the University of Arkansas-Monticello. She describes the natural connection between Japanese culture and financial planning: "A core part of Japanese culture is setting a goal and seeing where you want to be in five years. So, in my class, we write a letter to our future selves to visualize where we'll be. Financial literacy is key to achieving those goals."

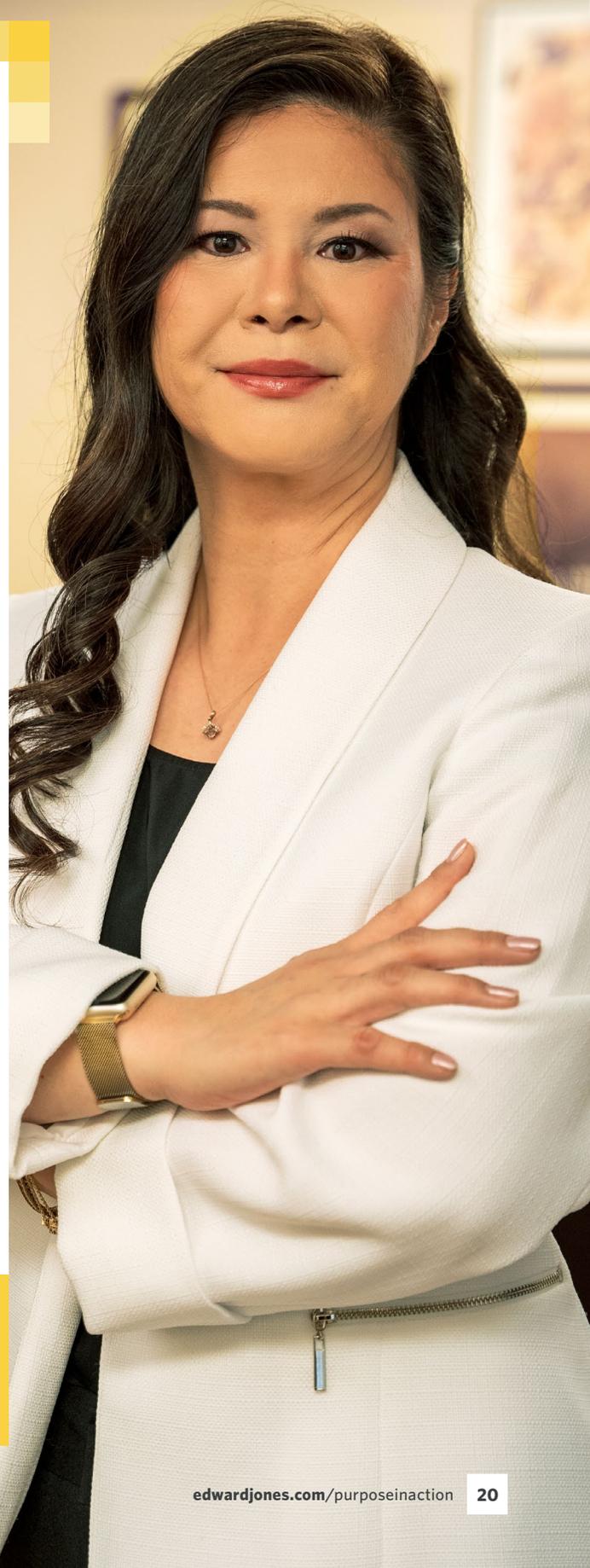
Branch location: Monticello, Ark.

Branch team: Financial Advisor KC Knobloch

Number of households served by the branch: 275

Percentage of clients deeply served⁹: 69%

"A healthy workforce means that we can create stability in the economy here. Health care is important, mental health is important."



We're 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 begins with taking care of our own, focusing on associate health and wellness, as well as talent development and retention, and extends into caring for our communities and our environment. Initiatives aligned with promoting healthier futures support Goal 3: Good Health and Well-Being and Goal 13: Climate Action of the United Nations Sustainable Development Goals.

Welcome from **Suzan McDaniel**

Chief Human Resources Officer

Edward Jones is a place of belonging, where our associates come together to live out our purpose and help clients achieve what matters most. Our purpose lies at the heart of everything we do; it's not surprising that in a recent associate survey, 80% of associates indicated they are inspired by our purpose statement.

One way we put our purpose into action is by providing comprehensive wellness programs for our approximately 52,000 associates and their dependents — including support and resources for financial, physical, mental and emotional health. We believe that investing in our associates' well-being enables each of us to enjoy life, pursue our passions and be the best versions of ourselves.

We're creating a place of belonging through a new flexible work model in our home office that gives associates and their leaders a choice in determining the right work arrangement that balances the needs of our business, teams and the individual. Whether associates choose to work full time at one of our campuses, full time at home or a hybrid model where they spend a few days in the office and a few days at home, we're encouraging them to use the office as a tool for collaboration — a space to come together for intentional in-person interactions that enable collaboration, creativity and innovation, driving our vibrant culture.

We're investing in our employee assistance program with a new self-service wellness platform called Learn to Live. We've enhanced our wellness program offerings through our partnership with Virgin Pulse, providing increased wellness seminars and enhanced mental health resources and services. And, we are upgrading our learning experience platform to support the continuous development and growth of our associates.

We're embarking on a strategic transformation and cultural renewal that is purpose-driven, leader-led and team-based. Our five culture mindsets are part of this evolution, enhancing our ability to live our purpose and broaden our impact to clients, communities and one another. These new ways of working are strengthening our purpose and culture and maintaining our reputation as a Great Place to Work®. Already, we've seen these efforts yield positive results, reflected in our most recent engagement survey of associates, in which 91% of respondents said they are "proud to work for Edward Jones."



Edward Jones' five culture mindsets:



Leadership

We hold ourselves accountable for helping others thrive.



Place of belonging

We create a place of belonging — a welcoming environment where we're all achieving our potential.



Continuous learning

We embrace and learn from new experiences and perspectives.



Effective decision-making

We make decisions in the best interest of our clients and firm and stay focused on the most critical priorities.



Growing our impact

We add greater value more quickly to our clients, colleagues and communities.

Caring for our associates

Making a positive impact in the lives of our clients, colleagues and communities begins with the care and support we provide our associates to address their own physical, emotional, financial and social well-being. Using a global well-being solutions provider, Edward Jones gives all associates and their dependents access to resources to help improve their quality of life. Once enrolled in the program, associates who also participate in the firm's health plan can earn medical plan premium discounts and incentives — across all populations of ability and wellness — based on daily activities and program participation.

Edward Jones is committed to comprehensive benefits to meet the needs of our associates. Our benefits include:

- Parental leave policy
- Comprehensive wellness program
- Expanded well-being support resources
- Online tutoring available to associates and their families
- 401(k) and HSA match (eligible branch team support professionals and home office associates only)
- Firm profit sharing contribution (eligible financial advisors, branch team support professionals and home office associates only)
- Financial education resources for associates and their families
- Flexible work policies

94%

participation rate in Edward Jones profit sharing

287th largest 401(k)

in the country

8%

average contribution



Expanding the limited partnership⁵

Partnership is part of the history of Edward Jones, dating back to Ted Jones, the firm's second managing partner, who proclaimed that those who do the work should share in the results of those efforts. Today, our firm is the last remaining partnership of significant size in our industry.

We provide ownership opportunities to eligible associates, including financial advisors, branch team support members and home office associates, as a way of recognizing their contributions to our success and as a way to invest in our firm's future.

Since the firm's first limited partnership offering to associates in 1974, our partnership has grown, and so too has the investment opportunity for eligible associates. In 2022, we celebrated our largest offering to date.

\$568 million

of partnership interests issued to approximately 28,000 eligible associates — of whom more than 11,000 were new, first-time limited partners — in January 2023

49% increase

in interests from last full offering

Day of Caring: Grassroots success

Day of Caring is a benefit offered to full-time home office and branch support team members, who are encouraged to spend a day (individually or with other associates) bringing Edward Jones' purpose to life while giving back in a way that is personally meaningful. These examples are just a few representing the heart of what our Day of Caring is all about — giving our time and talent back to our communities.



Harvey Kornblum Jewish Food Pantry

Since 2015, Channel Slate, a legal leader assistant in the St. Louis home office, has used her Day of Caring hours to help the community in different ways. This year, she and several home office associates spent the day volunteering at the Harvey Kornblum Jewish Food Pantry, the largest food pantry in the region. Edward Jones volunteers organized the pantry's shelves, packed bags of food and located specific items for families.

Feed the Children®

On May 26, 2022, more than 100 Edward Jones associates in Indiana teamed up with Feed the Children for their Day of Caring, helping provide food and resources to children and their families.



Coburn Place

In June, branch support team members Donna Sharp, Karin Dreyer, Pamela Fisher and Andrea Driver spent their Day of Caring at Coburn Place, a haven whose mission is to empower people affected by domestic violence in the Greater Indianapolis area. The group spent the first part of the day picking up trash, pulling weeds and watering flower beds. In the afternoon, the team spent time indoors, sorting and labeling donated materials for the residents.

>700 volunteer hours

donated by our associates packing meals

104 associates

participated

>\$30K donated

through corporate and associate giving

Fostering a mindset of continuous learning

As a firm, it's important that we embrace and foster a mindset of continuous learning, providing all associates with new experiences and offering new perspectives to embrace and learn from. We work closely with our associates to create learning and development plans and provide required and optional courses and training.



As ONE Edward Jones, we aspire to ...

Associates & Leaders:

- Grow our impact
- Make effective decisions
- Deliver the right outcomes



Associates & Leaders:

- Create a place of belonging
- Engage with emotional intelligence
- Learn continuously and help each other grow

People Leaders:

- Shape our future
- Build highly effective teams
- Inspire personal growth

Creating hope for associates in need

Whether they're wildfires, hurricanes, floods or global pandemics, federally declared disasters are why the Edward Jones Disaster Relief Fund was created. The Fund helps our associates and their families recover with resilience when the unexpected strikes.

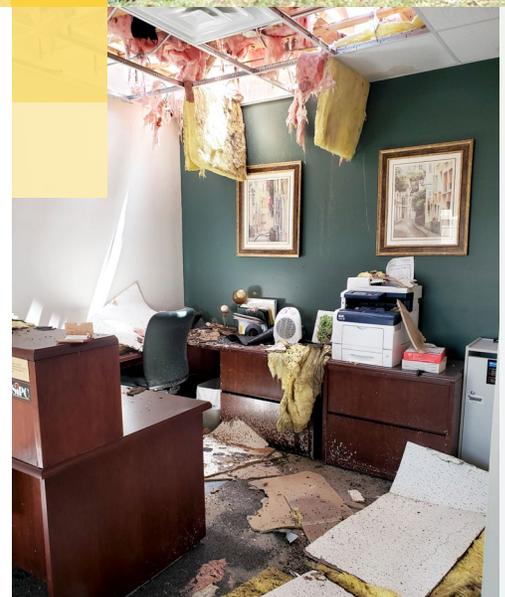


Hurricane Ian and the Disaster Relief Fund

The Disaster Relief Fund was activated following Hurricane Ian, which had a devastating impact on many of our colleagues. In Florida, 96 associate homes and 52 branches suffered various degrees of damage, eight of the branches with major damage.

Associates within the affected areas, as well as some from outside, rallied to the cause, tirelessly working to offer help. Associates mobilized to support one another, coordinating supply drops and crews to help with repairs.

"I cannot say enough how incredibly grateful I am for the ONE Edward Jones experience I had," said Alisha Hemeon, senior service specialist and interim team leader in Tailored BOA Support in Punta Gorda, Fla., directly where the eye of Hurricane Ian made landfall. "I was immediately assigned an HR disaster rep who checked on me and coordinated deliveries of supplies and gift cards (by hand, as mail was not running at the time). Branch associates from the area spent hours at my home to help with tree and debris removal."



Nearly \$200,000 distributed in 2022 to 40 associates and families from associate, retiree and Edward Jones Foundation contributions.

"My family and I are truly thankful to Edward Jones and all the associates who assisted, donated to the Disaster Relief Fund and volunteered to help."

Alisha Hemeon

Senior Service Specialist and interim team leader in Tailored BOA Support in Punta Gorda, Fla.



Uniting for Ukraine

Financial advisors Rob Sturgill and Lee Russell have been assisting Ukrainian refugees in Poland since the conflict with Russia began. As their work continues, the firmwide response has demonstrated how the spirit of caring is stronger than ever at Edward Jones.

Rob logged thousands of miles and countless travel hours in 2022, transporting refugees along the Poland/Ukraine border before flying home to Twin Falls, Idaho, to visit his family and support his nonprofit, Type of Wood Charities. On return trips to Poland, Rob would bring back donations of much-needed resources such as trauma kits, medicines, medical supplies and baby formula.

After hearing of Rob's efforts, Lee Russell, financial advisor in Gainesville, Texas, wanted to help as well. Lee traveled to Poland and served alongside Rob, helping to transport families from refugee relief centers to neighboring Polish towns. Many associates have joined this effort, making financial contributions and donating goods to support the efforts of Type of Wood Charities and other organizations working to support the Ukrainian people.

The Edward Jones Foundation provided financial support totaling \$250,000 to Ukrainian relief efforts through donations to three humanitarian organizations. With these contributions, the Foundation amplified the impact of associate giving and invested in a healthier future for the people of Ukraine.

Feeding the Kansas City community

In June 2022, Edward Jones associates in the Kansas City region hosted a month-long food drive in support of Harvesters — The Community Food Network, an organization that provides food and related household products to more than 760 nonprofit agencies in 26 counties across Missouri and Kansas. The team collected items during the region’s annual client appreciation event, in local branches and through a community event.

As a result of Edward Jones’ effort, and food donated by clients, community members and local businesses, 149,442 meals were collected for people facing food insecurity at a time of heightened need.



149,442
meals collected

161
associates
participated

400+
hours volunteered

75
branches
participated

Innovating with our clients for a more sustainable world

The firm has a long history of environmental stewardship dating back to Ted Jones, son of Edward Jones Sr., and his work establishing the **Katy Trail** in 1990, the country's largest recreational rail trail. Today, Edward Jones is creating a stronger future through innovations such as sustainable investing and donor-advised funds, reducing paper consumption through e-delivery and improving air quality by planting trees. The firm has begun the work of establishing a baseline for its Greenhouse Gas (GHG) Emissions. Gaining a better understanding of current environmental impact enables Edward Jones to identify opportunities to mitigate emissions, increase awareness about potential climate-related risks, and determine business strategies relating to procurement and operations.

Reducing paper consumption

Our desire to lead with purpose extends to improving the quality of life for our associates and neighbors and minimizing our overall environmental impact for the sake of future generations. Edward Jones has an expansive home office and branch real estate portfolio designed for associate office, training and data center use. As a consumer of natural resources and a responsible citizen, we are evaluating long-term strategies to operate in environmentally sustainable ways.

One initiative that exemplifies our commitment to sustainability is our digital strategy to reduce paper consumption. Clients are increasingly choosing electronic delivery of documents, from 37% in 2019 to 58% at the end of 2022.

We're continuing our commitment to sustainability through advancements in our digital strategy to reduce paper consumption. In 2022, Edward Jones saved a total of 10.1 million pounds of paper, promoting an avoidance of more than 91.4 million pounds of CO₂ emissions.⁷ Thanks to these efforts, our paper reduction saved the equivalent of over 120,600 trees⁸ — that's close to seven times the total number of trees in Central Park. Edward Jones paper reduction efforts have provided more than \$96 million in total savings, and we are proud to continue our investment in sustainability throughout our local communities.

Saved a total of 10.1 million pounds of paper, promoting an avoidance of more than 91.4 million pounds of CO₂ emissions.⁷



Sustainable investing

In 2022, the firm offered new options to clients for investing with purpose. These **sustainable mutual funds and exchange-traded funds (ETFs)** enable clients to invest their money in a socially conscious way, if they choose to do so, as part of their financial strategy. The firm continues to enhance its offerings as well as its advice and guidance to meet the needs of clients who desire to make sustainable investing part of their investing strategy.⁶

133

total sustainable mutual funds and ETFs offered at the end of 2022

More than \$1.5 billion

invested by clients in sustainable mutual funds and ETFs in 2022 (as of Dec. 31, 2022)

Planting for the future

In Spring 2022, Edward Jones launched a new alliance with the Arbor Day Foundation to beautify communities and reduce carbon emissions. Through a combination of team member plantings in 12 communities and reforestation projects, the firm planted 11,250 trees throughout the U.S. in celebration of its 100-year anniversary. To ensure canopy growth and longevity, the Foundation's network of local planting partners will monitor and care for the newly planted trees, which will provide ecological benefits such as CO₂ sequestration, air quality improvements and stormwater runoff reduction for years to come.



Learn more about how we're planting for positive impact.



11,250 trees planted through community plantings in 12 cities and reforestation projects throughout the U.S.

The Arbor Day Foundation expects the impact
of the trees over 40 years to be:

**Nearly
1.9 million
gallons**
avoided water runoff

43 tons
air pollutants
removed

**10,049
metric tons**
CO₂ sequestered

Projected 40-year estimates reported by the Arbor Day Foundation,
configured using USDA Forest Service i-Tree Tools.

Fighting to end Alzheimer's

Since 2016, Edward Jones has proudly served as a National Presenting Sponsor for the Alzheimer's Association Walk to End Alzheimer's, which takes place in more than 600 communities each year. Since then, more than 98,000 participants have walked under the Edward Jones banner. The firm and its associates have raised \$39 million for the fight to end Alzheimer's disease.

2022 marked the second year of our renewed, five-year strategic alliance with the Alzheimer's Association. Our continued support will enhance their care and support programs, provide educational materials, fund critical Alzheimer's research and impact early detection.

As a firm, we prioritized Alzheimer's as our first national community sponsorship for a multitude of reasons and have pledged to raise \$50 million with an estimated 150,000 Walk to End Alzheimer's participants by the end of 2025.

98,488

Walk to End Alzheimer's participants since 2016

\$39 million

raised since 2016



Why we walk:

Mahea Akana, Senior Branch Office Administrator, Ga.

"I lost my dad to Alzheimer's in 2017. We missed the signs; it hit us like a ton of bricks one day when he got lost and couldn't find his way home. A kind stranger approached him and asked if she could help. Luckily, she was able to call my mom and he made it home safely.

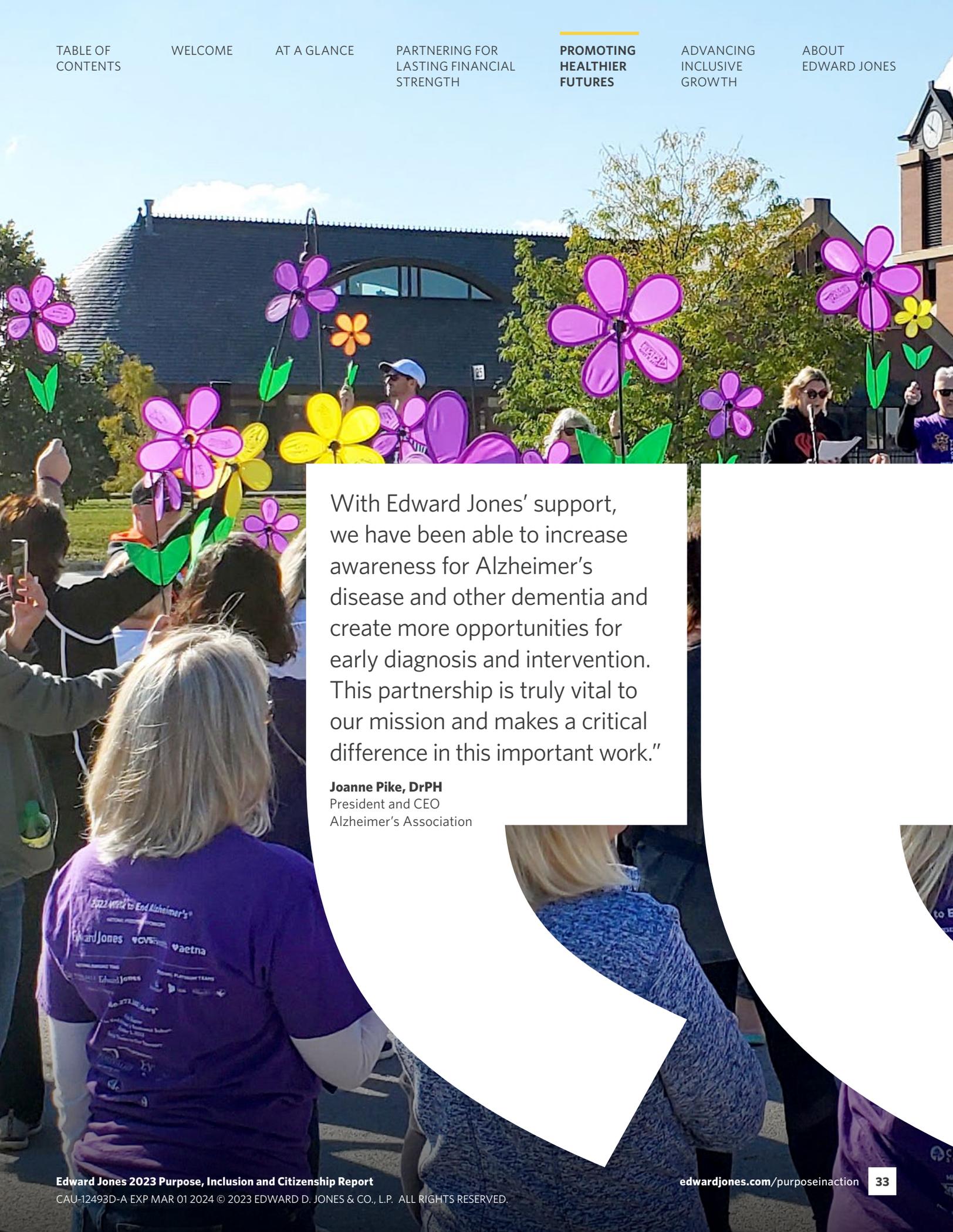
"As his disease progressed, it became more difficult for my mom to care for my dad by herself. She had to make the difficult decision to sell their home in Hawaii, which she had lived in since 1965, moving to Georgia to live with me. Shortly after they arrived in 2015, my dad's condition worsened, and by Labor Day, he was in the hospital and unable to return home.

"My mom visited him every day of the week, sometimes twice a day, for the first year he was in his nursing home. Eventually, he had no idea who this person was that came to sit with him and feed him.

"We lost my dad a week after my parents' 60th wedding anniversary. If you have been affected by this disease personally, you know how difficult it is, and why we must all fight by joining the Walk to End Alzheimer's. I walk for my family, and for yours."



Join us in the fight against Alzheimer's disease.



With Edward Jones' support, we have been able to increase awareness for Alzheimer's disease and other dementia and create more opportunities for early diagnosis and intervention. This partnership is truly vital to our mission and makes a critical difference in this important work."

Joanne Pike, DrPH
President and CEO
Alzheimer's Association

Giving cancer the boot in Canada

Since early 2021, we have been a supporter of The Terry Fox Foundation in Canada. Our contribution of more than 415,000 Canadian dollars since early 2021, raised through corporate and associate giving, supports the organization’s mission to find a cure for cancer by funding outstanding research.

Terry Fox was 18 when he was diagnosed with osteosarcoma (a form of bone cancer) and forced to have his right leg amputated in 1977. On April 12, 1980, Terry dipped his artificial leg in the Atlantic Ocean and began his Marathon of Hope, a cross-country run with the ambitious goal of raising \$1 from every Canadian (\$24 million). After 143 days and 3,339 miles, Terry stopped running outside of Thunder Bay, Ontario. His cancer had spread to his lungs, and he tragically passed away nine months later. Today his legacy lives on, and The Terry Fox Foundation has raised over \$850 million and funded 1,300 innovative cancer research projects, bringing hope and health to millions. The foundation funds all types of cancer research projects, with a focus on the most difficult and incurable cancers.

More than 415,000 Canadian dollars

contributed to The Terry Fox Foundation through corporate and associate giving since 2021



A Spirit of **Caring**

Katie Schonaerts of Union, Mo.

As an Edward Jones associate for more than 20 years, Katie Schonaerts has witnessed the spirit of caring at every level. Schonaerts began in the home office as part of the public relations and communications team. In 2006 she transferred to become a branch team support professional in nearby Washington, Mo. In 2017, she became a financial advisor in Union. At each stop, her appreciation only grew for the many ways Edward Jones helps clients and communities.

Volunteering with local community clubs was a great way to connect, especially in an area where Schonaerts grew up. From Rotary president to committee work with the United Way, Library Board and Historical Society, engagement and involvement are a core part of Schonaerts' personality. But when Edward Jones formed a partnership with the Alzheimer's Association, and began participating in local walks, it gave her pause. She was initially reluctant to engage as she witnessed firsthand the impact of the disease on her own family. Schonaerts ultimately faced her fears and recognized the need to be strong and give back to the organization that had helped her family.

With so many seniors and their families suffering from Alzheimer's, Schonaerts recognized the natural connection in the partnership between Edward Jones and the Alzheimer's Association. She credits her colleagues with helping her move past her personal hesitation and into a frame of mind where she could make a real impact. "This is a scary disease, and, given my family history, I know it could impact my family in the future again. I want to help find a cure and make it go away. With the support of my branch teammates, I joined a committee to recruit others to be a part of Walk to End Alzheimer's. Working with others who help you realize the potential that you have inside of you, even when you have some self-doubt, is so critical."

Branch location: Union, Mo.

FA can serve date: July 2017

Branch team: Senior BOA Maureen Schmuke

Number of households served by the branch: 402

Percentage of clients deeply served⁹: 84%

"My Grandpa Herbie suffered from Alzheimer's," Schonaerts said. "It was impactful during my high school years. My grandparents are from this community, too, and we spent a lot of time with him after school. When he could no longer recognize me or my siblings, it was terrifying."



We're 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.

Our focus on diversity, equity and inclusion starts within our firm and extends into our local communities. Initiatives aligned with advancing inclusive growth support Goal 10: Reduced Inequalities and Goal 11: Sustainable Cities and Communities of the United Nations Sustainable Development Goals.

Welcome from **Jennifer Kingston**

Head of Diversity, Equity,
and Inclusion (DEI)

Different perspectives make for better business and diversity, equity and inclusion (DEI) at Edward Jones are truly for everyone — regardless of background, demographics or circumstances. We each have a story and perspective to share that is not just encouraged here but vital to strengthening our diverse, equitable and inclusive firm.

We are committed to equipping our associates with the resources to reach the increasingly diverse pool of clients we seek to serve and enable all our colleagues to bring their authentic selves to work every day. And we want to be a national leader at it — creating a legacy that leaves our firm better than when we arrived and builds a place where everyone feels like they belong.

While there is still much to be done in this space, we are excited about the progress made in 2022 to embed diversity, equity and inclusion in our systems and processes to ignite human potential. We are proud of our 12 Business Resource Groups promoting diversity, equity and inclusion. In 2023, all will be available for enterprise-wide membership. We're also proud of our colleague contributions to impact our tailored DEI initiatives, establishing our supplier diversity program and the strengthened allyship and mentorship across the firm to deepen impact and belonging.

Hosting our first in-person DEI Conference was so special last year because it had a reunion-like atmosphere for hundreds of branch team members, financial advisors and home office associates from across the firm who gathered to grow together, learn together, persevere together and nurture one another. We continue to pave a bold path forward accelerated by new processes and alignment around key priorities, where we can make an immediate impact, and acting transparently with our measures to advance diversity, equity and inclusion.

We have set our north star of who we want to be as a firm. We're not shying away from it, and instead holding ourselves accountable to it.



**Learn more about our commitment to diversity,
equity and inclusion.**



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.

Connecting across the enterprise

We are committed to growing our inclusive firm, advancing equity and inviting input from a broad range of perspectives to create more innovation and value. Our Business Resource Groups (BRGs) at Edward Jones are key influencers who multiply DEI impact through their members' engagement. BRG members and allies come together to discuss their unique experiences, help attract and retain talent, and discover ways to serve current and future clients more deeply, especially as wealth transfers quickly and specifically to more diverse, affluent households. In 2009, Edward Jones established the first group — the Black/African American BRG — and in 2023 all 12 of our BRGs will be available for enterprise-wide membership.

Advancing our five-point commitment

At Edward Jones, we know progress depends on our collective hard work and the authentic actions of our associates. Our commitments to diversity, equity and inclusion — including a five-point commitment in the U.S. and a four-point commitment in Canada — talent representation goals, and our everyday ways of working are all important to building a truly inclusive culture at Edward Jones.



Diversifying representation

We have underscored the importance of being a diverse, equitable and inclusive firm by setting ambitious representation goals to increase the number of people of color and women among leadership and financial advisors in the U.S. and Canada by the end of 2025. For many years, we have been progressing toward these goals through hiring as well as through development, advancement and retention:

	Current	2025 Goals
U.S. and Canadian financial advisors of color:	9%	15%
Female U.S. and Canadian financial advisors:	23%	30%
People of color in leadership* in the firm's U.S. and Canadian headquarters:	19%	20%
Female leadership* in the firm's U.S. and Canadian headquarters:	49%	50%
General partners of color in U.S. and Canadian headquarters:	14%	15%
Female general partners in U.S. and Canadian headquarters:	32%	40%

*Leaders include leaders of leaders and leaders of associate roles. All percentages are as of Dec. 31, 2022.

Our five-point commitment to diversity, equity and inclusion includes:

Giving everyone a voice

Equitable hiring, training, promotional practices and policies

Continuing racial-equity training and anti-racism personnel policies

Supporting organizations and programs important to our clients, colleagues and communities, including 3 Community Courageous Conversations

Conducting an analysis of pay



Learning **together**

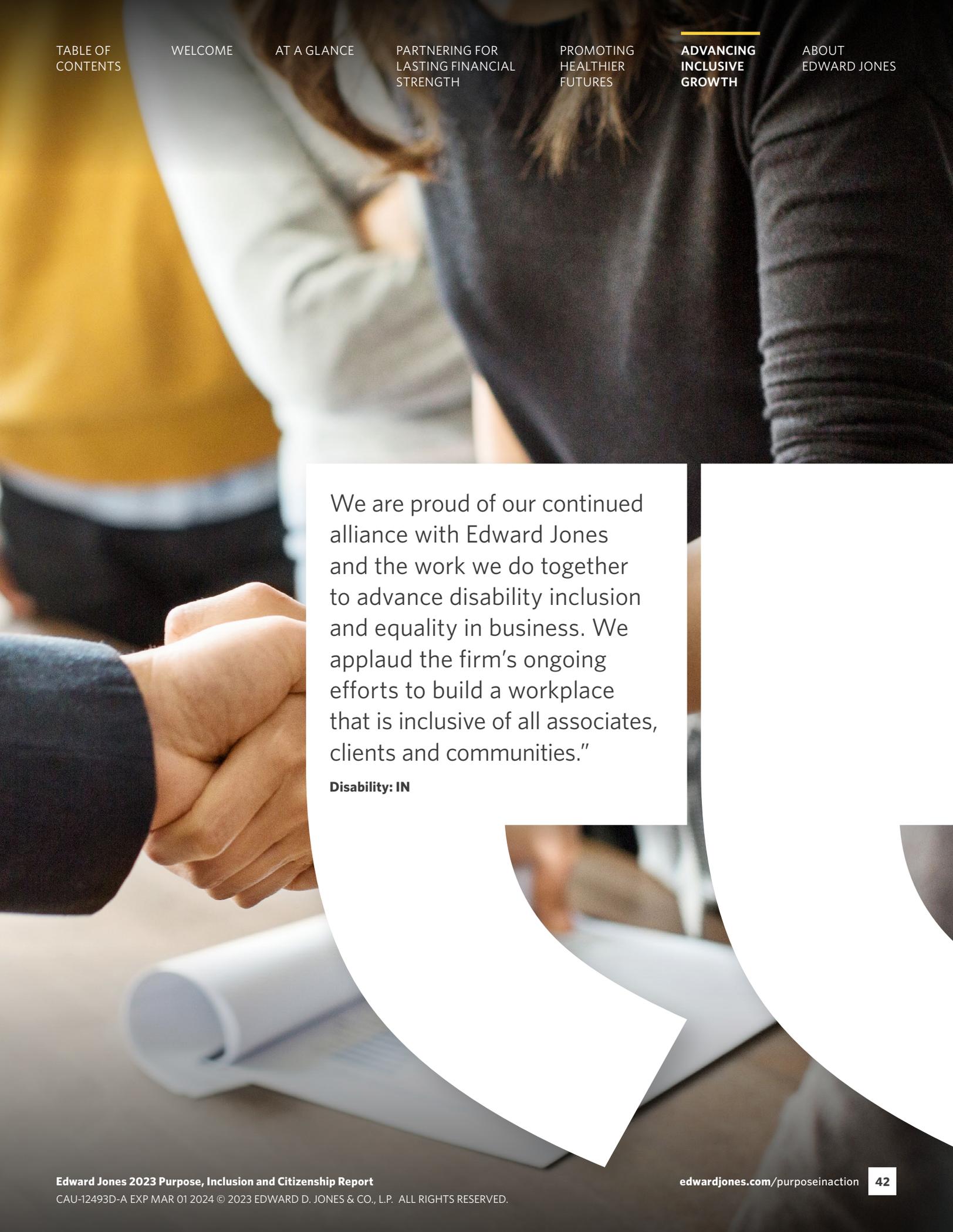
Our 12 Business Resource Groups (BRGs) are firm-sponsored, associate-led affinity groups that contribute to our DEI objectives in key areas like attraction, retention, development and community engagement. They provide a space to celebrate shared passions and cultures by co-hosting learning workshops and events year-round. We know that when we come together as a trusting and authentic community, we feel more connected to one another, to our firm and to our purpose and society. This list represents just a sample of the programming in 2022 that benefited all Edward Jones associates, and in some cases, those in our local communities:



BRG	Our focus	Key event/workshop
adaptABILITIES	Works to ensure Edward Jones is a firm that leverages each individual's strengths and abilities, regardless of visible or invisible challenges, to better serve our clients and potential clients.	A hybrid session featured V15able ("visible") Founder and CEO Letisha Wexstten, who shared her story about discovering the need for an employment service for people with disabilities after she struggled in the job market herself.
Asian and Pacific Islander (API)	Expands and highlights members' contributions to the firm's success by advocating for inclusion, celebrating individual differences and providing a platform to strengthen our capabilities.	Co-hosted by our API and Women's BRGs, with invited guests from the community, this event featured a conversation between Edward Jones Managing Partner Penny Pennington and award-winning veteran broadcast journalist Michelle Li. Michelle co-launched the Very Asian Foundation to combat racism and empower the solidarity of allyship.
Black/African American	Serves a diverse client base by aligning strategies to firm priorities, increasing referrals, providing professional development and community involvement opportunities, identifying cultural nuances and leveraging perspectives of our diverse workforce.	An internal panel featuring Washington University Professor of Law Kimberly Norwood, who discussed the common practice by people of color to "cover, pass and code-switch."
Caregivers	Creates a greater level of empathy, understanding and support for caregivers inside the firm, as well as our clients. Works to fulfill the Edward Jones Promise Statement to create a place of belonging for all and stay true to our mantra of "You Matter" by increasing the firm's awareness and support for associates who are caring for a loved one(s).	Expanded our mental health courageous conversations to be a yearlong experience that offered colleagues timely, relevant resources for personal well-being. Each event was facilitated by an external licensed clinical social worker. By year end, we hosted more than three dozen conversations and supported more than 1,500 associates.
Green	Engages a wide range of home office associates to promote education and advocacy surrounding issues pertaining to environmental sustainability, sustainable development, environmental justice and related health impacts.	A presentation by Jan Glendening, North America Regional Managing Director — The Nature Conservancy, featured the expansive impacts of sustainability in North America.
Interfaith	Celebrates, supports and fosters understanding and acceptance of all faiths, those with no religious affiliation and spiritual diversity among our associates.	A year-end event featured leaders from Google and Salesforce, who shared details about their organizations' inter-belief networks, the business case to establish them and how to approach religious tolerance in the workplace.

BRG	Our focus	Key event/workshop
Latinx/Hispanic	Provides personal and professional development opportunities for our Latinx/Hispanic associates and the communities we serve, while increasing cultural awareness across the firm.	Speaker, leadership coach and workplace innovator Cileia Miranda-Yuen discussed the importance of emotional intelligence to develop better relationships with the Hispanic population.
LGBTQ+ and allies	Creates ideas and activities that build meaningful experiences for all associates, investors and clients, inside and outside the firm, through the lens of lesbian, gay, bisexual, transgender, queer/questioning, plus associates and LGTBQ+ allies.	An intersectional event co-hosted by our LGBTQ+ and Allies and Interfaith BRGs, where leaders from Tanenbaum and PFLAG National provided real-life examples illustrating the many ways religious and LGBTQ+ identities intersect and can create inclusive workspaces.
Military/Veteran	Supports the firm’s mission by providing awareness and understanding of military members, veterans and military families’ situations while addressing their needs and presenting Edward Jones as an employment opportunity within their community.	Internal panelists joined Public Safety Financial CEO Mike Galloway to discuss the lessons and leadership skills honed through military service and how that impacts their careers.
Remote connections	Fosters connectedness and career growth throughout the firm to break down locational barriers to create a place of belonging for home-based, hybrid, campus-based and field-based associates to connect with colleagues from across North America, both virtually and locally.	A session featuring LifeCycle Focus Founder and President Gail Parsons on how to make positive changes in your life. The session focused on energy renewal, which is not about just doing more with less in our fast-paced, multitasking world.
Women	Advocates for women within the firm by educating and empowering associates, facilitating connections among associates and firm leaders, providing leadership opportunities and championing an inclusive environment, resulting in an expanded sense of inclusion in alignment with firm DEI efforts.	A multigenerational conversation led by a panel of internal colleagues who explored the power of transferring wealth — what it means for women, how our various identities intersect to create unique experiences and what this might mean for serving clients.
Young professionals	Enables the firm to be the first choice of young professionals for their career goals and/or long-term financial needs.	A dialogue focused on how the five different generations (Generation Z, Millennials, Generation Xers, Baby Boomers and the Silent Generation) of branch teams currently in the workplace incorporate the use of technology into their clients’ lives.





We are proud of our continued alliance with Edward Jones and the work we do together to advance disability inclusion and equality in business. We applaud the firm's ongoing efforts to build a workplace that is inclusive of all associates, clients and communities."

Disability: IN

Advancing disability inclusion

About 1 in 5 people in America live with some type of disability, according to the U.S. Census Bureau. To better serve our current and future clients, in 2022 we reflected upon and studied how we can optimize our tools and resources to create an environment that values the strengths and perspectives of all individuals and allows people with disabilities to more fully participate in the Edward Jones experience.

As an example, we are introducing closed captioning for Zoom across the firm following a successful 90-day trial in 2022 by 175 financial advisors, branch team support members and home office associates who are deaf or hard of hearing and/or those who serve deaf or hard-of-hearing clients.

Studies have shown that 90% of companies prioritize diversity, but only 4% elevate disability inclusion as a high priority.¹⁰ We seek to compassionately and strategically address disability inclusion the same way we do other diversity efforts. We believe communities and businesses are better because of the diverse backgrounds, strengths and perspectives of all, including people with disabilities.

Through our collaboration with Inclusively in 2022, we're expanding our hiring to help bring the strengths of individuals with diverse experiences and perspectives to our firm, which widens and improves our talent.

Inclusively's workforce inclusion platform connects job seekers with employers like Edward Jones. The platform has provided the insights, access, training and support needed to attract and retain previously hidden talent. Through our relationship with Inclusively, the firm now has aggregated access to a network of nonprofits and training programs that support diverse talent.



Recognized on FORTUNE Magazine's World's Most Admired Companies list

2022 Fortune World's Most Admired Companies list, published February 2022, in partnership with Korn Ferry, data as of November 2021. Compensation provided for using, not obtaining, the rating.

Recruiting events for diverse professional organizations

In 2022, Edward Jones partnered with local representatives of Prospanica, Association of African American Financial Advisors and the National Black MBA Association to hold diversity recruiting events in three markets. These events provided the opportunity for financial advisors to attend, deliver key thought leadership messages and build relationships with potential financial advisor prospective candidates. Edward Jones intends to hire about 1,500 financial advisors in 2023, including more women and people of color.



Edward Jones intends to hire about **1,500 financial advisors** in 2023, including more women and people of color



Training technology apprentices

In 2022, Edward Jones welcomed a class of six apprentices to the firm through a program with Access Point (powered by Daughtery), an organization that removes barriers and drives life-changing opportunities for young people and underrepresented populations by providing access to education, mentorship, financial support and long-term careers in technology. Edward Jones is a member of the Access Point Employer Partner Team.

The paid apprentices receive customized, job specific training and may have an opportunity for a full-time position upon completion of the program.

A Spirit of **Caring**

Joseph B. Peterson Jr., of Amarillo, Texas

If you're a young person growing up around Amarillo, Texas, there's a good chance you've felt the direct impact of Joseph Peterson's work. In the past year alone, Peterson has devoted his free time to painting cabins at the Girl Scouts Camp, coordinating toy drives for Toys for Tots, packing backpacks with nutritious snacks for Snack Pak 4 Kids® and camping with disadvantaged youths, providing needed mentorship and guidance through 101 Elite Men of Amarillo. He also serves on the boards of the United Way of Amarillo & Canyon and Cal Farley's Boys Ranch.

As a father to two young kids, Peterson says providing for his family is his top priority. But giving back to the community that raised him is a close second.

"I am who I am today because of the people who poured into me when I was a kid, so doing that now for other kids is very important. Everything I do is to give to those generations behind me."

Growing up in Amarillo and spending much of his life in West Texas, Peterson knows firsthand what it takes to instill confidence and connection in kids of the region. "I had my dad in the home, but a lot of my friends growing up didn't. I know how important it is to have that father figure to lend a voice and provide that mentorship."

Peterson says the spirit of caring at Edward Jones enables and encourages him to give back.

Branch location: Amarillo, Texas

FA can serve date: September 2013

Branch team: Senior BOA Gloria Elliott; On-call BOA Carolyn Timm Kistler

Number of households served by the branch: 510

Percentage of clients deeply served⁹: 67%

"At Edward Jones, we already focus on individuals and helping them reach their goals. The spirit of caring is about going beyond that, putting an increased focus on working together, to improve the community."



About Edward Jones

Edward Jones is a leading financial services firm in the U.S. and through its affiliate in Canada. As of Dec. 31, 2022, the firm's nearly 19,000 financial advisors served more than 8 million clients with \$1.6 trillion in client assets under care. Edward Jones' purpose is to partner for positive impact to improve the lives of its clients and colleagues, and together, better our communities and society. Through the dedication of the firm's approximately 52,000 associates and our branch presence in 68% of U.S. counties, the firm is committed to helping more people achieve financially what is most important to them. The Edward Jones website is [edwardjones.com](https://www.edwardjones.com) and its recruiting website is careers.edwardjones.com. Member SIPC.



Our purpose:

We partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society.

Our home office locations:

St. Louis, Mo.; Tempe, Ariz.; Mississauga, Ontario, Canada

Our impact:

>8 million

clients, 73% deeply served*

>15,000

branch locations throughout North America

Approximately 52,000

associates

24,000

full-time and part-time branch team support members

Nearly 19,000

financial advisors

\$1.6 trillion

assets under care

\$12.269 billion

annual net revenue

All data as of Dec. 31, 2022.

Activating our purpose, by the numbers

Partnering for Lasting Financial Strength	2021	2022	page
Meeting our clients' needs			
Clients deeply served (% of clients)	73	73	46
Education preparedness (# of 529 plans)	21	21	17
Protecting client data			
Privacy and fraud prevention — senior clients (# of cases)	726	1,372	16
Client data stewardship	Edward Jones is committed not to sell clients' data to any third-party provider		
Developing our colleagues			
Training (average # of hours per associate)	104 per associate in 2021, as reported in 2022		25
Performance reviews (% of associates)	*	90%	25
Branch teaming (# of branches with enhanced teaming options)	*	170	15
New branch and BOA roles (# of Registered Branch Associates)	*	200	13
Contributing to the economy			
GDP contribution	\$20 billion in 2021, reported in 2022		15
Local business creation	Indirect economic impacts are made by infrastructure investments such as the Katy Trail, impacting 335 nearby branches and other businesses		
Community job creation	Each Edward Jones job creates another 1.6 for a total of -140,000		15
Improving our communities' resilience			
Financial contributions (\$ of Edward Jones corporate, Foundation and associate giving)	>\$26 million	>\$34.3 million	7
Promoting Healthier Futures			
Offering our clients investments with impact			
Sustainable investing: Total sustainable mutual funds and ETFs (# of funds)	117	133	29
Donor-advised funds: amount invested by Edward Jones' clients in the Edward Jones Charitable Gift Fund (\$)	\$225 million	Nearly \$350 million	18
Donor-advised funds: amount granted to charities supporting causes or communities, advised by donor's recommendations (\$)	7 million	>57 million	18
Supporting our colleagues' well-being			
Associate benefits: participation rate in Edward Jones profit sharing	94%	94%	23
Associate benefits: average contribution to 401k	7.92%	8.04%	23
Disaster relief assistance distributed to associates in need (\$)	\$328,000	Nearly \$200,000	26
Improving community health			
Alzheimer's Association (\$ raised)	Nearly \$6 million, totaling >\$33 million since 2016*	Nearly \$6 million, totaling \$39 million since 2016	32
The Terry Fox Foundation giving (\$ raised for cancer research)	>200,000 Canadian dollars	210,000 Canadian dollars, totaling 415,000 Canadian dollars since inception	34
Protecting the environment			
Emissions management	Edward Jones is currently undertaking a collaborative process to identify baselines and meaningful yet realistic actions		
Forestation (# trees planted)	*	11,250	30
Reduction of consumption (# of pounds of paper saved)	7.2 million pounds	10.1 million pounds	29
Advancing Inclusive Growth			
Representing diversity and inclusion			
U.S. and Canadian financial advisors of color (%)	9%	9%	38
Female U.S. and Canadian financial advisors (%)	22%	23%	38
People of color in leadership in firm's U.S. and Canadian headquarters (%)	17%	19%	38
Female leadership in firm's U.S. and Canadian headquarters (%)	49%	49%	38
General partners of color in U.S. and Canadian headquarters (%)	12%	14%	38
Female general partners in U.S. and Canadian headquarters (%)	31%	32%	38
Supporting community equity and equality			
Organizations contributed to (# of organizations)	259	319	8
Day of Caring volunteer hours (# number of hours, all associates)	*	Nearly 58,000	5
Number of Business Resource Groups	*	12	40
Number of Community Courageous Conversations held	*	3	39
Educating communities			
Edward Jones Financial Fitness (# of learners)	*	Nearly 450,000 since inception	18

*2021 data was not published in or has been updated since the prior year's report.

Thank you for helping us make a positive impact on the lives of our clients, colleagues and communities.

edwardjones.com/purposeinaction
careers.edwardjones.com



Forward-looking statements

This report contains forward-looking statements within the meaning of the U.S. federal securities laws. You can identify forward-looking statements by the use of expressions that predict or indicate future events and trends and that do not relate to historical matters. You should not rely on forward-looking statements because they involve known and unknown risks, uncertainties and other factors, some of which are beyond the control of Edward Jones and its parent, The Jones Financial Companies, L.L.P. (the "Partnership"). These risks, uncertainties and other factors, including those described in the Partnership's filings with the U.S. Securities and Exchange Commission, may cause the actual results, performance or achievements of the Partnership to be materially different from the anticipated future results, performance or achievements expressed or implied by the forward-looking statements contained herein.

Footnotes

¹ As ranked by ISS Market Intelligence for Financial Advisor sold 529 plans.

² SIFMA.org, 2022

³ This information is for general informational purposes only and is not tax or legal advice. Please consult your tax advisor about individual tax considerations related to charitable contribution deductions.

⁴ Tax issues for 529 plans can be complex. Please consult your tax advisor about your situation. Edward Jones, its financial advisors and associates cannot provide tax or legal advice.

⁵ Limited partnership interests in The Jones Financial Companies, L.L.P. are securities and can only be acquired through a securities offering that complies with all applicable securities laws. There is no assurance that the firm will engage in future offerings of limited partnership to employees or that the offering criteria will be the same as in the past. Invitation to participate in any offering is at the discretion of the firm.

⁶ Mutual fund and exchange-traded fund investing involves risk. Your principal and investment return will fluctuate in value. Your investment, when redeemed, may be worth more or less than the original cost. Mutual funds and exchange-traded funds are sold by prospectus. The prospectus contains more complete information, including investment objectives, risks, and charges and expenses, as well as other important information that should be carefully considered. Your financial advisor can provide a prospectus, which should be read carefully before investing.

⁷ Source for CO₂ reduction. Environmental impact estimates were made using the Environmental Paper Network Paper Calculator Version 4.0. For more information, visit www.papercalculator.org.

⁸ Source for Tree Reduction (Environmental Paper Network)

⁹ Deeply served is a measure of the depth of client relationships that includes documenting client goals, risk tolerance and portfolio performance, and then implementing tailored solutions by way of suitable investments, insurance and/or services.

¹⁰ World Economic Forum, "Closing the disability inclusion gap with business leadership," May 23, 2022.

¹¹ Analysis conducted in 2022 of economic and tax contributions of Edward Jones' operations in the United States and Canada in 2021.