

Broadening Your Knowledge of Investing



Key steps toward achieving your financial goals



Edward Jones investment principles

We focus on
individual investors

Long-term
investment
philosophy

Relationships
are key

Seminar overview



Develop
a strategy



Stick with
quality



Diversify



Invest for
the long
term



Focus on
what you
can control



Always
keep
learning

Rule 1: Develop a strategy



Develop
a strategy



Stick with
quality



Diversify



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Rule 2: Stick with quality



Develop
a strategy



Stick with
quality



Diversify



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Rule 3: Diversify



Develop
a strategy



Stick with
quality



Diversify



Invest for
the long
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Focus on
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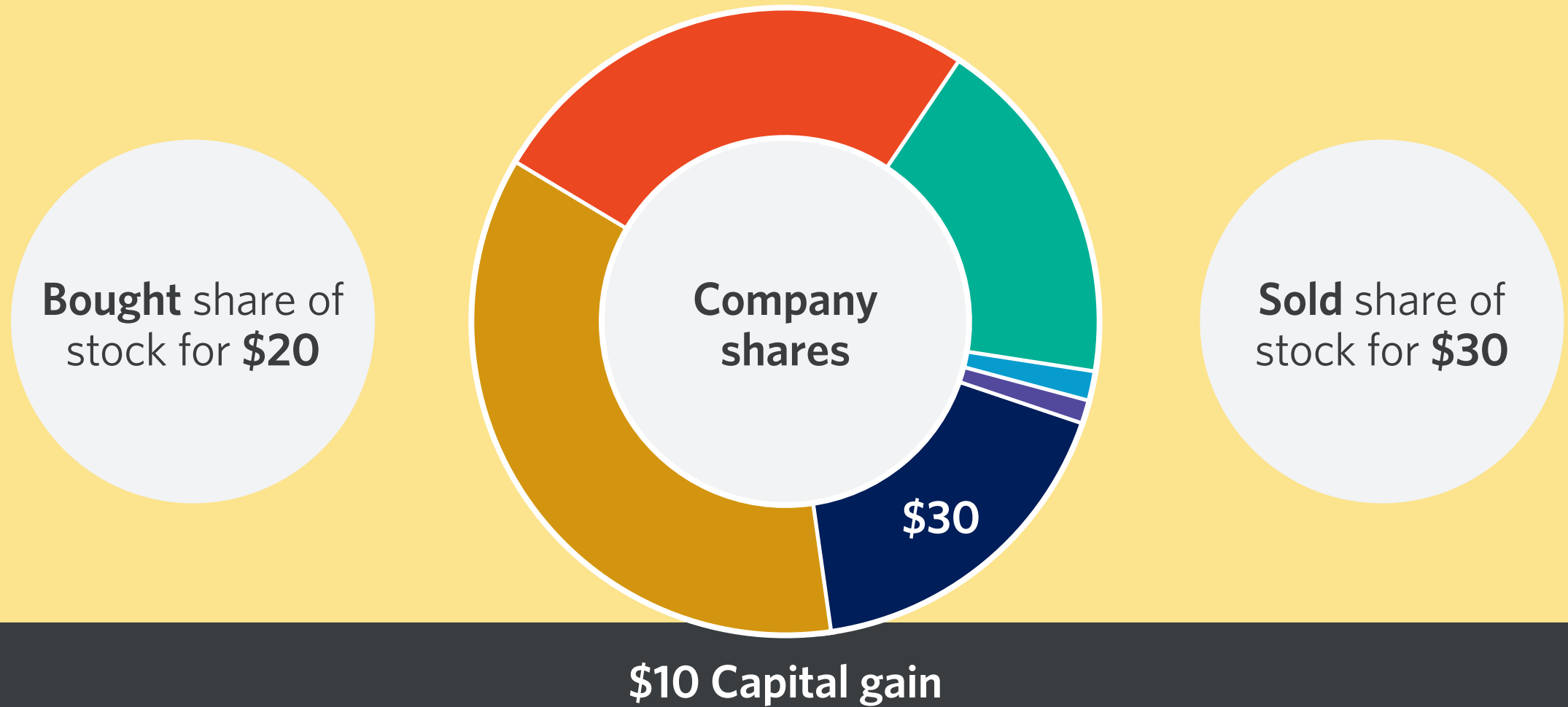
Diversify: Bonds, variety



Diversify: Why bull and bear?



Diversify: Stocks



Diversify: Packaged investment products



Growth



Income



Growth and
income

Diversify: Benefits of mutual funds



Multiple companies

Diversification

Professional management

Diversify: Mutual funds earnings

Bonds = Interest

Share price of
mutual funds



Stocks = Dividends

Capital gains
distribution



Rule 4: Invest for the long term



Develop
a strategy



Stick with
quality



Diversify



Invest for
the long
term



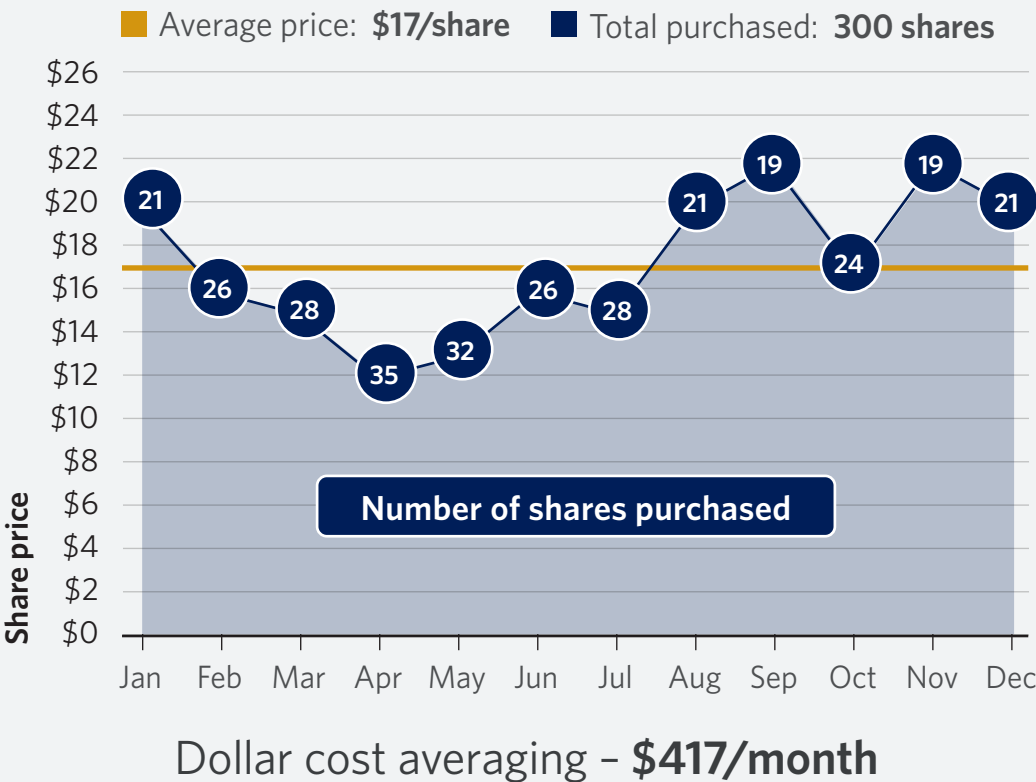
Focus on
what you
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Invest for the long term: Systematic investing

Systematically investing vs. lump-sum investment



Source: Edward Jones. These charts are for illustrative purposes only and are not intended to represent the performance of any security. These illustrations do not include commissions or fees. Past performance does not guarantee future results. Stock prices can also go down, which could result in a loss of principal invested.

Rule 5: Focus on what you can control



Develop
a strategy



Stick with
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Diversify



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Focus on
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Focus on what you can control: Plan budget review

You can control:

- Saving and spending habits
- Having an emergency fund
- Your level of debt



You can't control:

- Stock market
- Tax laws
- Every investment has some risk

Rule 6: Always keep learning



Develop
a strategy



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Diversify



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Always keep learning: Prepare for a setback

Less than half of adults are confident of their ability to recover quickly from a financial setback.*



*Source: Edward Jones. December 2020 Morning Consult national survey of 2,220 adults



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Summary

Rule 1



Develop
a strategy

Rule 2



Stick with
quality

Rule 3



Diversify

Rule 4



Invest for
the long
term

Rule 5



Focus on
what you
can control

Rule 6



Always
keep
learning

Any questions?

Please be sure to complete your seminar evaluation form.

