

Overview of Edward Jones



History

**Founded
in 1922**

by Edward
D. Jones Sr.

Headquarters in
St. Louis

First offices
**located throughout
Missouri and Illinois**

Grew from
304 offices in 1980
to **nearly 16,000**
U.S. and Canadian
offices today

Edward Jones

Edward Jones today

Largest U.S.
brokerage firm in
terms of offices

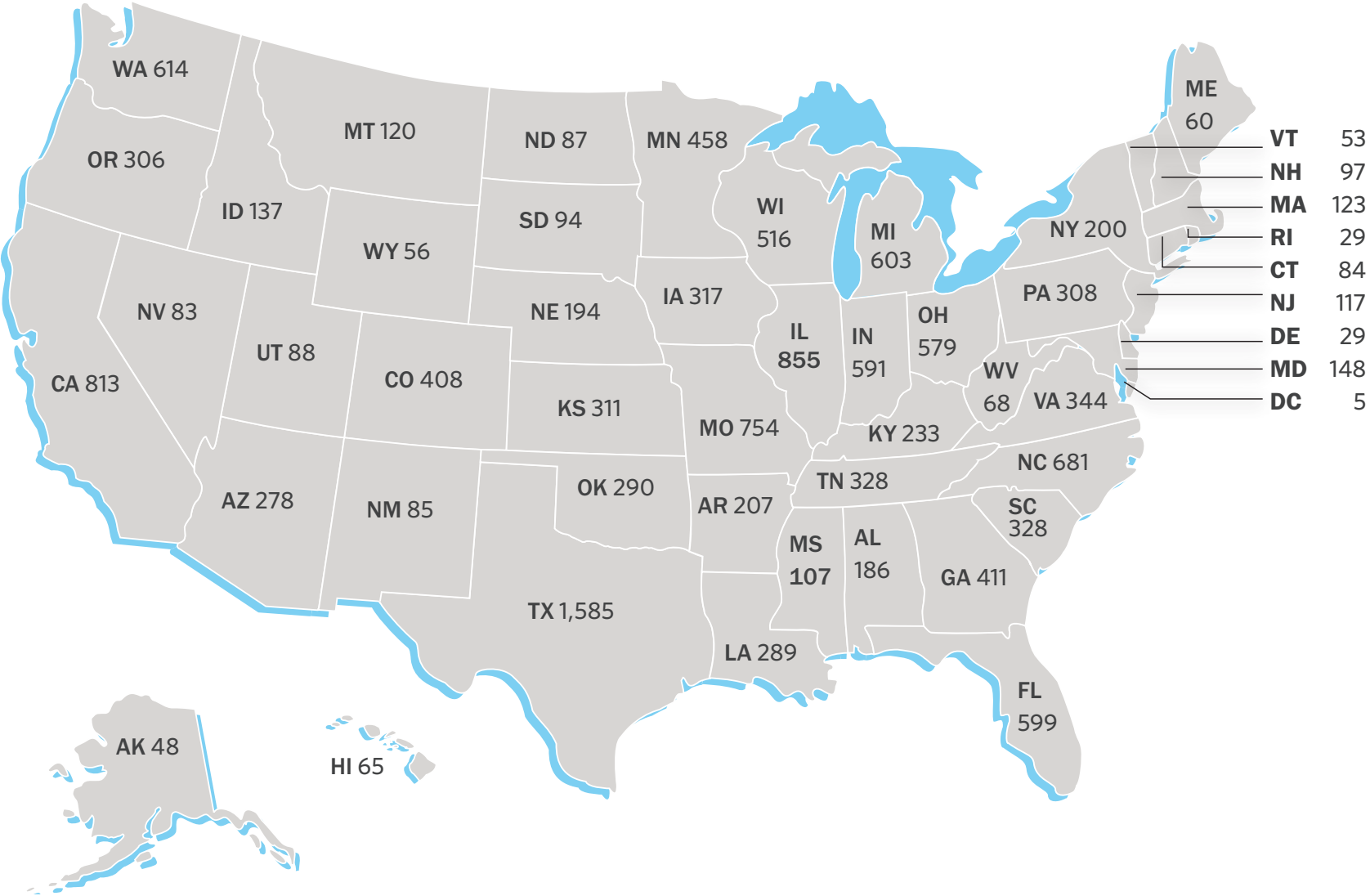
North American
firm with affiliate
in Canada

More than 8 million
clients and \$1.7 trillion
in assets under care^{*}

*As of May 2023. Past performance is not a guarantee of future results.

Where we are

United States offices



As of February 2023

Where we are (cont.)

Canada offices



As of April 2023

Recognitions

FORTUNE 50

MAY 2022

Edward Jones ranked No. 303 in *FORTUNE* magazine’s annual listing of largest U.S. companies by revenue, with more than \$12.3 billion in revenue in 2021. This is the firm’s 10th consecutive year on the list.¹

FORTUNE

2023

Named one of the “100 Best Companies to Work For” by Great Places to Work and Fortune[®] magazine, ranking No. 62 overall in 2023. Also, in 2022, ranked as one of the Best Workplaces in Financial Services and Insurance and the Best Workplaces for Millennials.^{2, 3}

1 Fortune 500, published May 2022, data as of December 2021. Compensation provided for using, not obtaining, the rating. FORTUNE and FORTUNE 100 Best Companies to Work For are registered trademarks of Fortune Media IP Limited and are used under license. FORTUNE and Fortune Media IP Limited are not affiliated with, and do not endorse the products or services of, Edward Jones.

2 2023 Fortune 100 Best Companies to Work For, published April 2023, research by Great Places to Work, data as of August 2022. Compensation provided for using, not obtaining, the rating.

3 2022 Fortune Best Workplaces in Financial Services and Insurance published September 2022, data as of August 2021. Compensation provided for using, not obtaining, the rating. 100 Best Workplaces for Millennials in 2022, published Fortune July 2022, Great Places to Work data as of March 2022. Compensation provided for using, not obtaining, the rating.

Recognitions (cont.)

J.D. POWER

JULY 2022

Ranked “Highest in Employee Advisor Satisfaction Among Financial Investment Firms” by J.D. Power.⁴

TRAINING APEX AWARDS

FEBRUARY 2023

For the 23rd consecutive year, Edward Jones has been recognized a top training company, having been named to the 2023 Training APEX awards list by Training magazine. Edward Jones ranked No. 14. Additionally, Edward Jones was recognized with a Best Practice Award.⁵

⁴ JD Power Highest in Employee Advisor Satisfaction (2022): 2022 Highest in Employee Advisor Satisfaction among Financial Investment Firms in the J.D. Power U.S. Financial Advisor Satisfaction Study, published JD Power July 2022, data as of May 2022. Compensation provided for using, not obtaining, the rating.

⁵ 2023 Training Magazine Training Apex Award, published February 2023, data as of September 2022. An application fee was required for consideration.

Recognitions (cont.)

HUMAN RIGHTS CAMPAIGN

2022

Earned a perfect score on the Human Rights Campaign Foundation's 2022 corporate Equality Index (CEI), which measures corporate policies and practices related to LGBTQ+ workplace equality.⁶



⁶ 2022 Best Places to Work for LGBTQ+ Equality, Great Places 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.



What makes us unique

- Our commitment to you, the serious, long-term investor, and your future
- Office locations that are convenient for you
- Personal relationships to fit your comfort level, whether that's in person or virtually
- Our partnership structure

Our Purpose

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

- Preparing for retirement
- Retirement income
- Paying for education
- Preparing for the unexpected
- Planning your estate or inheritance



Financial needs



Investment philosophy



Buy quality



Invest for the
long term



Diversify

Investments and protection

Investments

- Stocks
- Bonds and fixed income
- Mutual funds
- Exchange-traded funds (ETFs)
- Fixed-income unit investment trusts (UITs)

Protection

- Life insurance
- Long-term care insurance
- Long-term disability insurance

Services

- Business retirement Plans
- Education Savings
- Edward Jones Advisory Solutions®
- Edward Jones Flex Funds® Account
- Edward Jones Guided Solutions®
- Edward Jones Income Manager®
- Estate Considerations and Trust Services
- Financial Calculators
- Individual Retirement Accounts (IRAs)
- Insured Bank Deposit Program
- Investor Education Programs
- Online Access
- Portfolio and Retirement Plan Reviews
- Research
- Retirement Account Consolidation
- Saving, Spending and Borrowing Solutions
- Systematic Investing

Any questions?

