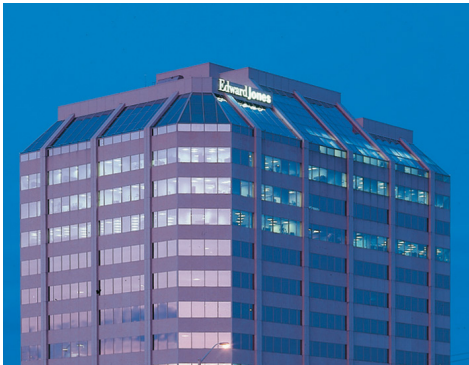


# Edward Jones Fact Sheet

December 2023

## Canada\*



### Headquarters

- Mississauga, Ontario

### Business

- More than **850** advisors
- More than **1,800** associates
- Offices for more than **25** years



### Accolades

- Edward Jones ranked #1 in Investor Satisfaction with Full-Service Wealth Management Firms<sup>1</sup>, according to the J.D. Power 2023 Canada Full-Service Investor Satisfaction Study.<sup>1</sup>
- Edward Jones Canada received the highest-ranking brokerage award in the **2023 Annual Wealth Management Advisors Survey**. This award recognizes Edward Jones' commitment to corporate culture and ethics, training and support, compliance and regulation, and compensation. As one of the largest brokerage partnerships in North America, Edward Jones fosters a culture that embraces diversity, and creates opportunities for employees to leverage their strengths and growth mindset.
- For the 22nd consecutive year, Edward Jones placed in the **top 25% for employee engagement** in the 2023 List of Best Employers in Canada published in the Financial Post, December 2023.

## North America\*



### Headquarters

- Mississauga, Ontario, Canada
- St. Louis, Missouri, USA

### Firm

- An associate-owned private partnership with more than **50,000** associates

### Branches

Nearly 19k financial advisors across the United States and through the firm's affiliate in Canada\*

### Business Principles

Our goal is to help meet the financial needs of individual investors with:

- A proven investment philosophy
- Personalized client service
- Carefully chosen quality investments

### Clients

- More than 7 million investors
- \$1.8 trillion in assets under management

### Financial

- \$10.2 billion in net revenue for 2020

### Investment Philosophy

We recommend that our clients:

- Hold quality investments for the long term within a diversified portfolio<sup>2</sup>
- Review their portfolios regularly to help ensure they're on track to reach their long-term goals

\* Edward Jones is a limited partnership in Ontario, Canada, and is a wholly owned subsidiary of Edward D. Jones & Co., L.P., a Missouri limited partnership ("Jones US"). Jones US and its parent do not guarantee the obligations or liabilities of Edward Jones.

<sup>1</sup>Edward Jones received the highest score in the J.D. Power 2023 Canada Full-Service Investor Satisfaction Study of investors' satisfaction with full-service investment firms. Visit [jdpower.com/awards](https://www.jdpower.com/awards) for more details.

<sup>2</sup> Diversification does not guarantee a profit or protect against loss.