

# Summary of Changes to the Edward Jones Advisory Solutions<sup>®</sup> Home Office Brochure Supplements

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We are writing to notify you of changes to the Edward Jones Advisory Solutions® Fund Models Brochure Supplement and the Edward Jones Advisory Solutions® UMA Models Brochure Supplement.

### Summary of change

Updates to Brochure Supplements for home office associates: Disclosure guidelines adopted by the U.S. Securities and Exchange Commission (SEC) require all firms offering advisory services to provide clients with Brochure Supplements. A Brochure Supplement is a resume-like document for both your financial advisor and for the home office associates who provide oversight of the investments selected for Edward Jones Advisory Solutions programs.

This oversight team is called the Advisory Investment Committee (AIC). We wanted to inform you of some recent changes to the Brochure Supplements you previously received. Please take a moment to review the most recent updates to these documents, which are listed below.

### Summary of recent updates:

Dario Castagna has replaced Tim Baldes as a member of AIC. Dario is a home office associate responsible for the portfolio construction guidance and implementation of firm discretionary accounts and the management of proprietary funds. Please review Dario's brochure supplement below.

Dario Castagna  
Edward Jones  
12555 Manchester Road  
Saint Louis, MO 63131  
314-515-2000

### Business experience/education background

This section describes the individual's business experience for the past five years and education.

Edward Jones Team Leader

Bocconi University, Italy, Master's Degree  
University of Chicago Booth School of Business, Master's Degree

### Year of birth: 1977

CFA® (Chartered Financial Analyst®) – A professional designation granted by the CFA Institute. The CFA designation, or charter, may only be earned by individuals with four years of qualified investment work experience who become a member of the CFA Institute, pledge to adhere to the CFA Institute Code of Ethics and Standards of Professional Conduct and complete the CFA Program. The CFA Program consists of three levels including three exams that test and represent the individual's competence, integrity and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management and security analysis.

This individual holds the following securities registration(s):  
General Securities Representative (Series 7)  
Uniform Combined State Law Examination (Series 66)

**Disciplinary information**

This section provides information about certain legal or disciplinary actions available through FINRA BrokerCheck: None

**Other business activities**

This individual engages in the following investment-related business activities: Not applicable

**Additional compensation**

This section describes other economic benefits the individual may receive as a result of providing advisory services to clients: This individual may receive profit sharing distributions and partnership earnings based on the profitability of the firm.

**Supervision**

This section describes how Edward Jones monitors the advice provided by the individual — Edward Jones supervises and monitors the advice given by the individual through regular reviews of the investments and portfolio construction. Clients can contact Kristen Steffens, Principal, at 855-283-3672 with questions or comments regarding the supervision of the individual.

**No action is required by you.**

Thank you for choosing Edward Jones to help you reach your financial goals. Please contact your financial advisor with any questions.

***Note: If you have more than one advisory account, you may receive a duplicate notice for each account.***