Edward Jones®

Important Changes to the Edward Jones Guided Solutions® Brochures & Client Services Agreements

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Starting on Oct. 30, 2023, Bridge Builder Mutual Funds will be made eligible in Guided Solutions. The Bridge Builder Mutual Funds are affiliated investments, meaning they are advised by an affiliate of Edward Jones, and are available exclusively to purchase in Edward Jones investment advisory programs.

The Bridge Builder Mutual Funds' portfolios are constructed by combining the investment styles and strategies of multiple third-party money managers ("Sub-advisers") that are chosen by a fund's investment adviser. The sub-advised structure may provide access to a broader universe of money managers than an individual investor may otherwise access.

Further, the Bridge Builder Mutual Funds' investment adviser has contractually agreed to waive its management fees to the extent management fees to be paid to the adviser exceed the aggregate management fees owed to a fund's sub-advisers. This waiver, which can be terminated at any time, may result in lower fees for a client compared to investing in similar strategies in Guided Solutions.

In addition, your Guided Solutions Brochure now includes a description of the fact that the Program Fee, assets under care, Reserve Line Advance, and/or client margin loan balances (as applicable), may impact a financial advisor's eligibility for the receipt of a newly available limited partnership profits interest in The Jones Financial Companies, L.L.L.P.

Again, no action is required by you as a result of these changes. If you would like more information about Bridge Builder funds, please contact your financial advisor to learn more and determine if these funds are appropriate for your portfolio.

The most up-to-date version of your Brochure and Client Services Agreement is available at edwardjones.com/disclosures and from your financial advisor. The Brochure will also be available on the SEC's website at adviserinfo.sec.gov. Please contact your financial advisor if you have any questions. Thank you for choosing Edward Jones to help you reach your financial goals.

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

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