Edward Jones

Finding Fulfillment

Edward Jones 2026 Purpose, Inclusion and Citizenship Report

Our purpose: To partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society.

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About this report: Edward Jones is a leading financial services firm which operates throughout North America in the U.S. and Canada. The firm's more than 20,000 financial advisors ("FA") serve more than 9 million clients with a total of $2.5 trillion in client assets under care as of December 31, 2025. Edward Jones' purpose is to partner for positive impact to improve the lives of its clients and colleagues, and together, better our communities and society. Through the dedication of the firm's approximately 55,000[1] associates and our branch presence in 68% of U.S. counties and all Canadian provinces, Edward Jones is committed to helping improve the financial fulfillment for tens of millions of long-term investors across North America by providing comprehensive, personalized planning and professional advice. The Edward Jones website is **edwardjones.com,** and its recruiting website is **careers.edwardjones.com.**

In its eighth edition, the Purpose, Inclusion and Citizenship Report highlights the many ways Edward Jones' purpose and business impact came to life in 2025.

A letter from Penny Pennington

Managing Partner

At Edward Jones, our identity is defined by our purpose: We partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society.

Across North America, millions of individuals and families are making complex decisions about their financial futures — planning for education, navigating longevity, building wealth for the first time, caring for aging parents, growing small businesses or reinvesting in their communities. Our role is to partner with them through it all, offering advice that sees the full picture, adapts as life changes and builds financial confidence across generations, geographies and demographics.

Meeting clients where life takes them

Today, Edward Jones offers financial planning services, and we have a bold ambition: To serve more clients, more completely. As the needs and expectations of both today's and tomorrow's clients evolve, we're sharpening our focus on the areas that matter most for their financial well-being:

- Serving clients across generations by anticipating their needs as financial priorities shift and responding with the right guidance at the right moment
- Making it easy for clients to connect with us — in person, at their kitchen tables, at their workplaces, or through intuitive and secure digital experiences
- Helping clients make sense of their financial lives by providing planning-led advice that brings clarity to the numbers and the meaning behind them

Partnering as colleagues to create lasting impact

Our colleagues are at the heart of how we serve clients and communities. When our colleagues look back on their careers at Edward Jones, we want them to see a clear story of growth: new skills, new responsibilities, new partnerships and new ways to make a difference. As our firm grows, we are intentional about making sure opportunity and success grow with it. We're entering an era of innovation and shared success for our colleagues by:

- Fueling growth by expanding learning pathways, certifications, leadership opportunities and teaming models that support the moments that matter most in a colleague's life and career
- Building skills for the future through strengthening our resiliency, adaptability and agility as we define and shape tomorrow's client and branch experiences
- Elevating the colleague experience by designing strategies that support success and well-being across the entire career journey

Strengthening communities through shared commitment

Partnership extends beyond our clients and colleagues; it reaches deep into the communities we serve, where we see tremendous opportunity to go even further. We live and work alongside millions of clients and tens of thousands of colleagues in every part of America and Canada. We help people thrive and communities prosper by expanding access to financial assets and guidance, advancing health and economic mobility and empowering local leaders to direct impact where it matters most. Together, we are building stronger, more resilient communities by:

- Accelerating Financial Futures with $30 million committed to date to help families build long-term wealth through education, savings and access to new resources
- Doubling down on our commitment to advance good health through partnerships with the Alzheimer's Association® in the U.S. and the Terry Fox Foundation in Canada
- Deploying more resources, including nearly $1 million in 2025 from the Edward Jones Foundation through our U.S. Field Giving Program, to give more branch teams a voice in how we support their communities

When we invest in the people and places we serve, we spark momentum that strengthens communities and expands opportunity.

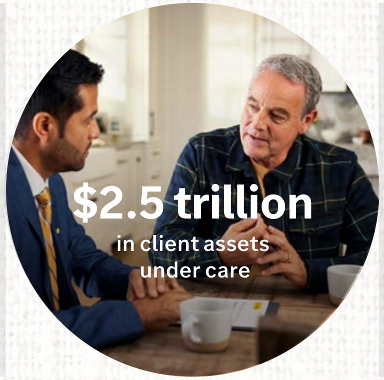
Together we serve, and together we're making a difference.

Penny Pennington,
Managing Partner, Edward Jones

At a glance

Improving the lives of our clients

More than
20,000
financial advisors serve more than 9 million clients



$2.5 trillion
in client assets under care

More than
1.3 million
workplace retirement plan participants

Investing in our colleagues

More than
5,100
financial advisors in the U.S. are active in new practice models

No. 1
in the industry for most Financial Paraplanner Qualified Professionals™ (FPQP®), with more than 2,500 among our client support team professionals*

Approximately
6,300
Business Resource Group members across the firm

Bettering our communities and society

321,800
associate volunteer hours logged in 2025

More than
$58 million
raised for the Alzheimer's Association through associate giving and corporate contributions since 2016

More than
1.3 million CAD
raised to support the Terry Fox Foundation since 2021

*Financial Paraplanner Qualified Professional™, FPQP®, and the FPQP® logo are certification marks or registered certification marks of The College for Financial Planning Institutes Corp. in the United States.

A clear focus on what matters most

Helping more clients achieve financial fulfillment is possible when we work together. In 2025, Edward Jones reached an important milestone in our journey to serve more clients, more completely. We now offer financial planning services with new products, solutions, technology and experiences to meet different clients' unique needs.

What's important to our clients is important to us. That's why we conduct regular materiality assessments* to help us prioritize and focus our Purpose, Inclusion and Citizenship efforts in three impact areas: Partnering for Lasting Financial Strength, Promoting Healthier Futures and Advancing Inclusive Growth.

*The materiality assessment does not mean material from a financial reporting perspective.

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

Topics most relevant to our key stakeholders:

Partnering for Lasting Financial Strength

We believe in the power of financial knowledge and confidence and a personal, needs-based approach to build long-lasting financial strength.

Financial stability, security and freedom

Colleague development and attraction

Community empowerment and stability

Transparent governance and business practices

Data privacy, security and protection

Promoting Healthier Futures

We work to promote the mental, emotional, physical, financial and social well-being of those impacted by health issues, so each person can live an enriching life.

Purpose-focused investment solutions

Health advancement and research support

Colleague well-being and benefits

Advancing Inclusive Growth

We invest to lift all people and communities, including the underserved, by equipping more people to fully participate in the economy and build the future they want.

Inclusive colleague engagement and growth opportunities

Responsible sourcing and partnerships

Policy influences on corporate responsibility

Diverse and accessible offerings and services

Purpose impact outcomes: We've committed to three purpose impact outcomes to hold ourselves accountable to our three main stakeholder groups as we bring our purpose to life.

We will improve the lives of our clients by ...

Creating greater access to financial resources, education and guidance.

We will improve the lives of our colleagues by ...

Partnering for greater colleague health and well-being.

We will better our communities and society by ...

Investing in economic inclusion to create opportunities for more people.

Improving the lives of our clients

Edward Jones now offers financial planning, serving more clients with more complex needs, from estate planning to workplace services, in nearly 15,000 branch offices throughout North America and three Edward Jones Generations® hub locations in the U.S.

Every day, more than 20,000 Edward Jones financial advisors and approximately 25,000 full-time and part-time client support team professionals are helping families achieve their financial needs, wants and wishes.

Helping more people feel financially fulfilled

Edward Jones' research uncovered four fundamental aspects to living a fulfilled life: Health, Family, Purpose and Finances[2]. While all of these "Life Pillars" are important, Finances is the one that supports everything else. With a deeper understanding of financial hopes and the challenges North Americans face, we can help investors achieve financial fulfillment — empowering them to pursue their dreams and goals.

How is financial fulfillment defined?
While the priorities and hurdles to achieving their dreams vary among Millennials, Gen Xers and Baby Boomers in the U.S. and Canada, investors' definition of financial fulfillment is generally consistent: Feeling financially secure, resilient to the ups and downs of life, and confident in their financial plans, knowing that their ongoing decisions and behaviors will help balance what's most important now and in the future.

28% of Americans
are willing to improve financial literacy to achieve financial fulfillment[3]

Financial Futures: Creating access & opportunities for more people

Financial Futures is a suite of programs and external relationships that strengthen the financial futures of households affected by systemic inequities. It can foster true wealth-building that transforms the lives of individuals and their families and focuses on bringing together three essential pillars: **Asset forward opportunities, financial education and data-enabled collaboration.**

We work with multiple organizations — nonprofits, fintech and financial service providers such as credit unions — to help improve financial strength with a particular focus on underserved communities. Key programs include:

Main Street: The Main Street Initiative supports small-business owners who help make our communities healthy, safe and strong. By uplifting businesses, business owners and local communities, the program can stimulate economic growth and prosperity on a broad scale.

Baby Bonds: Private and public funded mid-to-long-term programs that release cash to participants for wealth-building activities such as education, buying a home, investing or starting a business. These programs vary across private and public funded opportunities at state and local levels.

Matched Savings: In collaboration with national NGOs, Community Development Credit Unions join our efforts with the intent to expand and deepen incentivized savings strategies in low-income communities. Through this program, grant support can augment existing or develop new matched savings strategies in tandem with ongoing targeted financial education programming.

FORTUNE 500 2025

Edward Jones named No. 260 in 2025

Fortune 500 published June 2025; data as of December 2024. Compensation provided for using, not obtaining, the rating.

Providing more ways to achieve fulfillment

Financial fulfillment means providing our clients with confidence in their ability to achieve their goals.

Personalized, comprehensive planning

For eligible clients, Edwards Jones offers a tailored financial planning experience that goes beyond investment advice. Advisors work closely with clients to build a written, actionable plan that adapts to life changes and aligns with personal values and goals. The planning process covers five key areas:

- **Goal planning**
- **Cash and income management**
- **Investment allocation**
- **Risk and protection strategies**
- **Estate and wealth transfer**

As we continue to build our suite of advisory offerings, including financial planning services, we are significantly increasing the number of separately managed accounts available to clients, aiming to triple the number of available strategies by year-end.

Planning for retirement

Advisor to **263,000** workplace retirement plans with $106.9 billion in assets under care for more than 1.3 million plan participants

Helped more than
43,000 business owners start retirement plans in the last three years

$1.1 trillion in 7.7 million individual retirement accounts

Saving for education

23 529 plans

More than
892,000 accounts participate in 529 plans

$21.4 billion assets under care in 529 plans

Learn more about 529 education savings plans

Digital tools for ongoing engagement

We are committed to building a future where technology helps deepen relationships, expands access and empowers clients to take confident steps toward their financial goals. Our investments in digital capabilities — including Financial Planning Plus, and advancements in MoneyGuide, among others — are designed to support our financial advisors as they create seamless, personalized experiences that meet clients where they are and grow with them over time.

85% of people prefer a digital banking experience and a majority like to consolidate their saving, spending and borrowing needs, as shown by a Morning Consult[4] survey in September 2025

Partnership in action: Edward Jones® Everyday Solutions

Powered by us bank.

We launched a new partnership with U.S. Bank in 2025 to provide every Edward Jones client access to banking tools for a more integrated financial experience. Clients can manage their co-branded checking and credit card accounts within the Edward Jones app, effectively moving money between accounts with a tap of their fingertip.

Everyday Solutions Checking provided by U.S. Bank NA, Member FDIC. Edward Jones is not a bank and FDIC insurance only covers the failure of an insured bank. The creditor and issuer of Edward Jones Everyday Solutions MasterCard credit cards is U.S. Bank NA, pursuant to a license from MasterCard International Incorporated. MasterCard is a registered trademark, and the circles design is a trademark of MasterCard International Incorporated.

Offering values-based investment options

Personal values can often influence investor decision-making. We understand the needs of our clients and offer mutual funds and exchange-traded funds (ETFs) so clients can invest in values-based and socially conscious ways to support their unique financial strategies.

The Edward Jones Charitable Gift Fund is another investment tool for clients to support causes they care about through donor-advised funds (DAFs). A DAF is a contribution to a charitable fund where the donor receives an immediate tax deduction. Over time, clients can increase their impact by requesting grants be made from the DAF to 501(c)(3) public charities.

173 sustainable and values-based mutual funds and ETFs offered at the end of 2025 to clients and investors[5]

$6.5 billion invested by clients in sustainable values-based mutual funds and ETFs (as of Dec. 31, 2025)[5]

$639.7 million assets under care invested by Edward Jones clients in the Edward Jones Charitable Gift Fund

More than $283 million granted to charities supporting causes and communities advised by donors' recommendations

Partnership in action: Impact through innovation

Through Edward Jones Ventures*, our venture capital investing arm, we're connecting our clients to modern and scalable products and services. By investing in cutting-edge ideas and emerging technologies, we can deliver smarter, stronger solutions to help benefit our clients and branch teams faster than ever before. Recent investments include:

Aboon makes 401(k) plans easy for financial advisors. Aboon's technology reduces manual work and simplifies administration, freeing up time for business owners to focus more on growing their business.

Alix combines intelligent technology with human support to help families navigate the increasingly complex administrative and financial responsibilities that follow the loss of a loved one.

Vanilla turns complex estate planning into clear, visual conversations, helping clients understand their legacy and make confident decisions with their financial advisor.

Additionally, at our **Edward Jones Ventures Innovation Summit**, Edward Jones leaders hosted entrepreneurs, startup executives, venture capitalists and other industry leaders to accelerate ideas that will shape the future of wealth management.

15 businesses invested in since the launch of Edward Jones Ventures through the end of 2025

Approximately **150 attendees** at Edward Jones Ventures Innovation Summit

*Edward Jones Ventures is investing through JFCA LLC, an affiliate of Edward Jones.

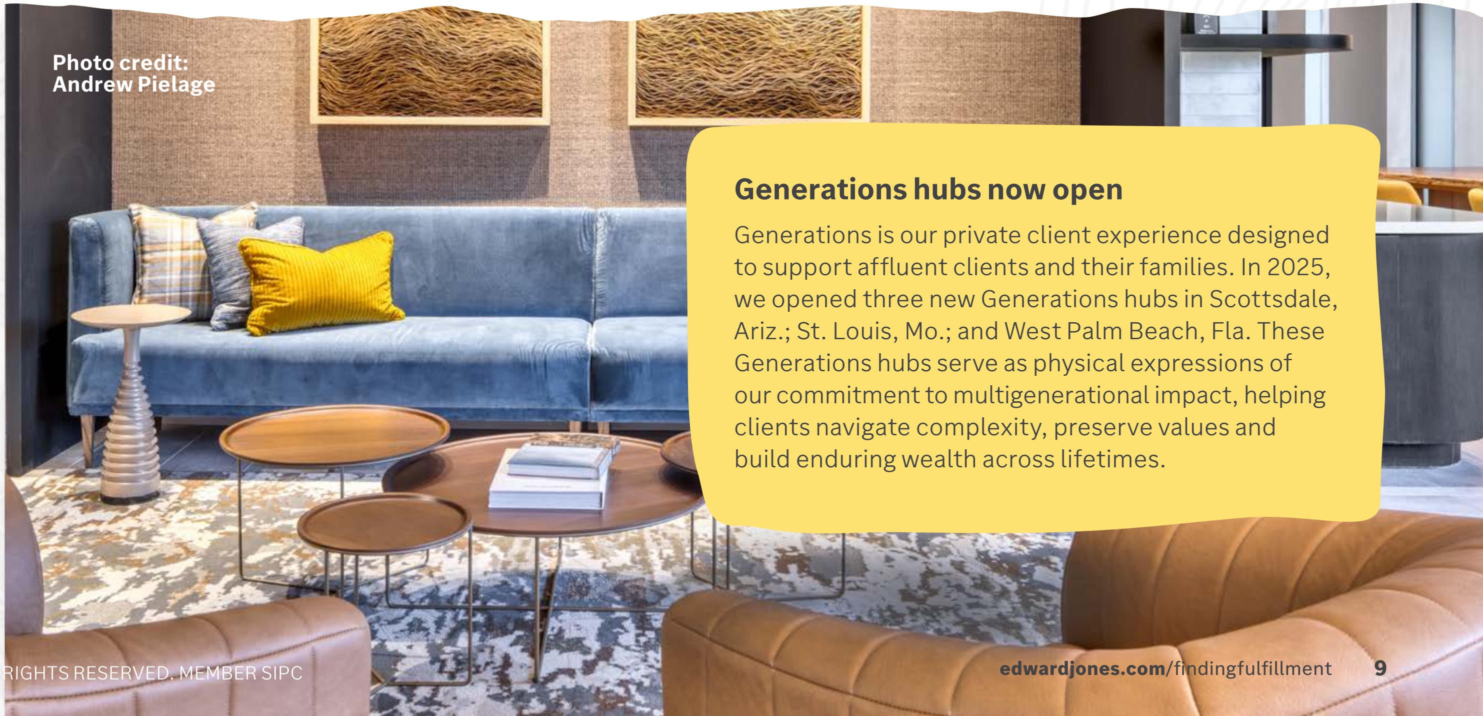


Photo credit: Andrew Pielage

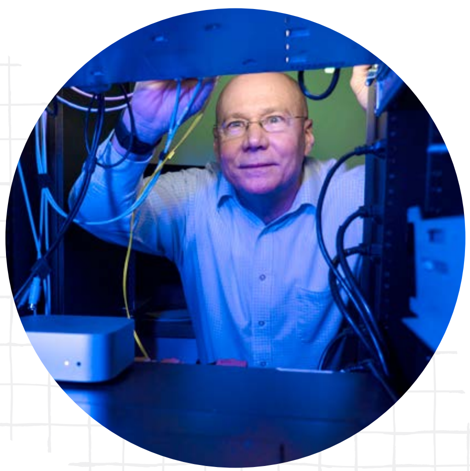
Generations hubs now open

Generations is our private client experience designed to support affluent clients and their families. In 2025, we opened three new Generations hubs in Scottsdale, Ariz.; St. Louis, Mo.; and West Palm Beach, Fla. These Generations hubs serve as physical expressions of our commitment to multigenerational impact, helping clients navigate complexity, preserve values and build enduring wealth across lifetimes.

Protecting clients against fraud

Fraud and cybercrimes are more prevalent and sophisticated than ever. At Edward Jones, our cybersecurity and Senior Client Protection teams are meeting the challenge, ready to identify, analyze and protect clients from the moment fraud is detected.

What does protection look like? In 2025, we've expanded our efforts, leveraging new tools and empowering our clients and practice teams to spot threats early.



- **Cybersecurity training:** 149,000+ associate training hours in security and client protection
- **AI-driven threat detection:** Real-time monitoring and predictive analytics to identify emerging risks
- **Senior client protection expansion:** More than 6,800 cases in 2025
- **Privacy** governance
- **Multifactor authentication** and encryption upgrades
- **Expanded due diligence** on third-party data processors
- **Strengthened compliance** with evolving regulatory standards
- **Increased advocacy** for clients

Caring for caregivers

More than **53 million adults**[6] identify as family caregivers, but there is a lack of support for caregivers nationwide, according to research from Edward Jones in partnership with Morning Consult and Age Wave. Edward Jones is currently supporting and advocating on state and federal levels for bipartisan legislation to help the millions of Americans who provide caregiving services to family and friends.

> "In the face of rising living costs and a looming retirement crisis, passing caregiving policies would not only help caregivers financially but it would give them a greater sense of security while prioritizing caring for their loved ones."
>
> — Ken Cella, Principal and Head of External Affairs at Edward Jones

Investing in the lives of our colleagues

At Edward Jones, we take care of each other. That means making sure each of our approximately 55,000 associates has what they need to best serve their clients, provide for their families and make a lasting impact in the communities where they live and work.

We're making critical investments in our associates with new wellness tools, expanded benefits, AI-enabled career training and development and more opportunities to make stronger connections with each other.

Teaming up for success

New teaming practice models are designed to meet the needs of all. We're moving beyond a one advisor, one client support team professional model to provide more flexibility, apprenticeship and succession planning for our financial advisors. Teams are designed on a branch-by-branch basis to meet changing client needs.

533 financial advisors in the U.S. are active in teaming models, with two or more financial advisors managing a single branch location and client list collaboratively

More than 5,100 financial advisors in the U.S. are active in new practice models

Approximately
1,000
Edward Jones U.S. field and home office associates earned the CFP® designation and/or Chartered Financial Consultant® (ChFC®) designation in 2025

More than 150
Certified Kingdom Advisors® or CKA® to build knowledge around weaving a faith-based perspective into financial discussions

No. 2
in the industry for most CFP® professionals,* with more than 5,100 associates in the U.S. field and home office as of Dec. 31, 2025

No. 1
in the industry for most Financial Paraplanner Qualified Professionals (FPQP), with more than 2,500 among our client support team professionals

*CFP Board owns the marks CFP®, CERTIFIED FINANCIAL PLANNER® and CFP® (with plaque design) in the U.S.

Investing in wellness for our associates

Each year we take a fresh look at our comprehensive benefits package for associates and their families. 2025 was no different. We listened to our associate needs and expanded our benefits in new and differentiating ways.

On top of our traditional benefits — health care, counseling, nutrition and fitness resources, paid leave, profit sharing, innovative mental health resources through **Headspace,** and 401(k) matching for those who are eligible — we're offering new benefits to better help our associates lead happier and healthier lives:

- Cardiometabolic health and nutrition resources through **Vida Health**
- New pharmacy benefits through **Anthem Carelon,** providing lower costs and more seamless integration with our medical benefit provider
- Expansive new voluntary, low-cost insurance options for pet care, identity fraud and attorney assistance
- At home physical therapy solutions through **Hinge Health**

Caring when a crisis hits

Our **Crisis Care Team** supports our associates 24/7 through critical moments, including working to activate the **Edward Jones Disaster Relief Fund** to help associates recover from federally declared disasters like wildfires, hurricanes and pandemics.

When tornadoes ripped through St. Louis, Mo., and London, Ky., in May 2025, hundreds of associates were hit hard. In addition to donating **$230,000** for local tornado relief, the Disaster Relief Fund also supported **58** cases, including providing gift cards, meals, lodging and income support.

Growing together through connection

Being a firm for all extends to our clients as well as our colleagues. We take great pride in our collective ability to create a place of belonging for one another. That starts with our approach to hiring and extends through career development, and our day-to-day culture of ensuring every associate is heard and feels valued.

Strategic advisory groups foster inclusivity. We blend financial advisors, client support team professionals and home office associates with different experiences, backgrounds and demographics to offer perspective and input to expand colleague engagement. On top of that, our 12 Business Resource Groups (BRGs) are open to all as forums to discuss unique experiences and ways to better serve our clients.

12 Firmwide BRGs with a focus on deepening empathy and understanding different experiences, backgrounds and perspectives

Approximately
6,300 BRG members
across the firm

When we get together, we make a difference

Edward Jones' annual **PRISM Conference** brings together associates from all roles to grow and sharpen their business acumen, lift up voices and share perspectives that help us all create stronger relationships with each other and our clients. More than 400 Edward Jones financial advisors, client support team professionals and home office associates participated in the conference in 2025.

In 2025, more than 10,000 associates participated in **Better Together Summits** and the **Mosaic Marquee Series,** strengthening cultural acumen, building relationships, and gaining perspective that enabled deeper connections with each other and with our clients.

With approximately 3,500 participants, the **Elevate Mentorship Program** brought together associates across all levels of the firm and provided opportunities for career growth and development.

"Participating in PRISM, our firm's celebration of inclusive growth and learning, was more than a professional and personal milestone. Representation of different perspectives and experiences matter. When we show up fully, our contributions to our work are even more impactful."

— Ermina Skamo, Client & Practice Transition Associate at Edward Jones

Bettering our communities & society

The impact we make in our communities throughout North America continues to be the lasting legacy of Edward Jones. The time, talent and treasure we give every day is felt by more people than ever.

Our strength as a firm is deeply connected to the health and vitality of the communities we serve. When the individuals, families and businesses we serve thrive, we thrive too.

Fostering economic mobility

Financial education and data enablement underpin our Financial Futures strategy. Financial education is most impactful when it is connected to real assets, which is why our programs align educational options to tangible assets. Through our internal programs and the organizations we support with grants, we teach important skills like managing debt, saving money and creating wealth.

Investment Clubs: Our Teen Investment Program is a club-style program that provides personal finance and investing education for high school students that involves investing in the stock market. The club is student-led and guided by a teacher who delivers the curriculum and oversees the students. Clubs run annually during the school year.

Cash Infusion: We offer external programs that provide supplemental income and a one-time cash resource to help individuals and households stabilize their financial situations and reach for a different future. The resources are used for basic amenities, utility bills and medical expenses. Through financial advisor guidance, these programs also target goals around the market, home ownership, home improvement and debt mitigation.

Our economic impact is felt far & wide

With a presence in 68% of U.S. counties and all Canadian provinces, our home offices and nearly 15,000 branch locations impact national and local economies.

$30.1 billion contributed
to our nations' GDP (U.S. and Canada) in 2025

Nearly 166,000 community jobs
supported in the U.S. and Canada in 2025

$22 billion of labor income
in the U.S. and Canada in 2025

Dollars for Doers and Charitable Match provide associates a giving option for donating their time to eligible U.S. 501(c)(3) or Canadian charitable organizations.

The Edward Jones Foundation will match eligible associate volunteer hours and donations up to $500 CAD/USD annually between both of these programs.

$3.3 million deployed through Dollars for Doers and Charitable Match in 2025

Giving our time, talent & treasure

In 2025, contributed **$46.9 million** through corporate, Edward Jones Foundation and associate philanthropic support to **more than 6,000** organizations representing a wide variety of causes

Approximately **25,000** associates supported more than **11,300** community organizations across North America

47,000+ hours for our 2025 Day of Caring, which allows associates to spend one paid day per year participating in volunteer activities of their choice

321,800 associate volunteer hours logged in 2025

Advocating for our clients & communities

In 2025, the Edward Jones Grassroots Task Force celebrated 40 years of service. We are proud to serve as the industry's only volunteer task force, advocating for our clients and communities at the state and federal levels. In 2025, we continued our focus on creating tax savings opportunities for caregivers.

Additionally, we hosted the **Edward Jones Public Policy Summit** in May, where our Grassroots Task Force convened with Edward Jones leaders and nearly **150 attendees** to discuss current and new initiatives and meet with congressional leaders in Washington, D.C.

More than 380 visits to Capitol Hill took place over three days during the Edward Jones Public Policy Summit on behalf of creating tax savings for caregivers

Edward Jones is a member, or has representatives on the boards, of several regulatory and industry organizations, including:

ICI
Money Management Institute
Federal Reserve Bank of St. Louis
nicsa
sifma
Insured Retirement Institute
BDA Bond Dealers of America
IAA Investment Adviser Association

Protecting generations through Alzheimer's research

An Edward Jones and Age Wave study revealed Alzheimer's is the most feared health condition among seniors.[2] Since 2016 we've been a proud partner of the Alzheimer's Association and a National Presenting Sponsor of their Association's Walk to End Alzheimer's®.

In 2025, we announced a new five-year strategic alliance with the Alzheimer's Association. This alliance goes far beyond our commitment to participate in more than 600 Walk events each year throughout the country. We work with this incredible organization to provide a 24/7 support line for our clients and caregivers, as well as deliver joint resources and seminars for our branches to help support their clients.

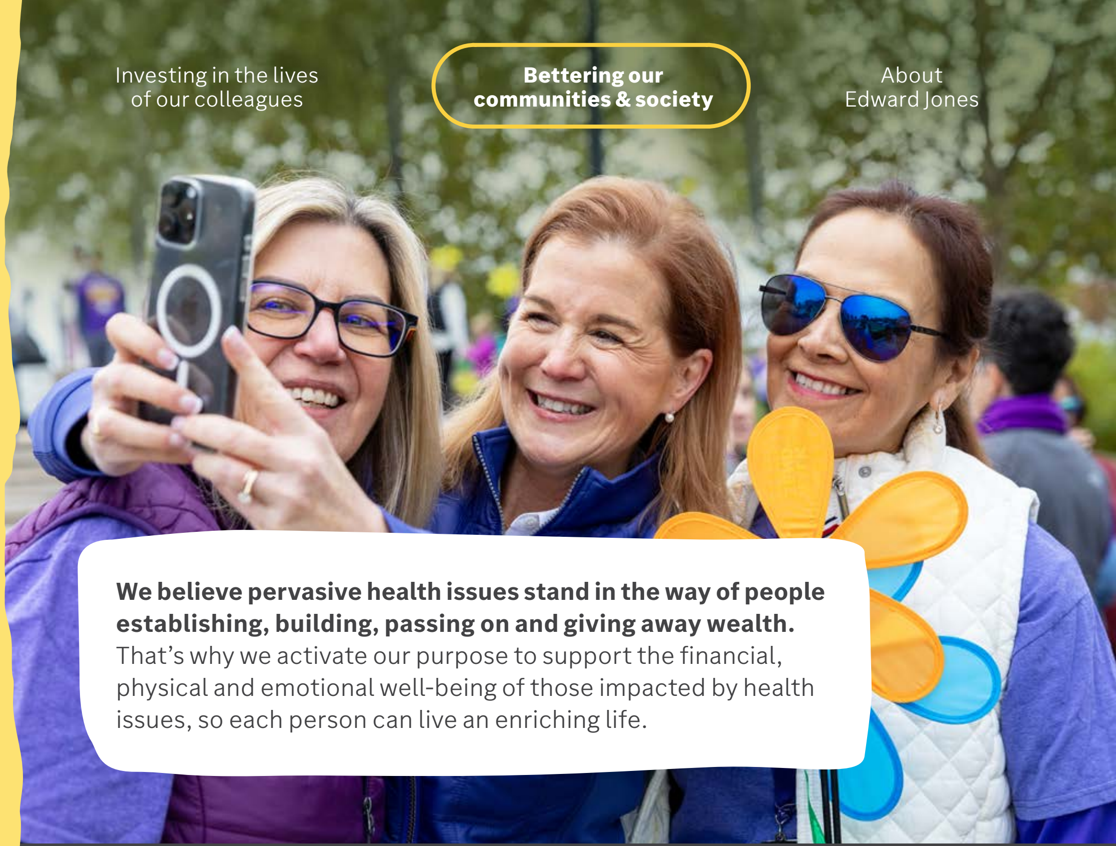
Estimated
300,000
Edward Jones clients have Alzheimer's or a related dementia

More than
$58 million
raised through associate giving and corporate contributions since 2016

$6.7 million+
raised in 2025

134,000+
Walk participants since 2016

Join us in the fight against Alzheimer's disease



We believe pervasive health issues stand in the way of people establishing, building, passing on and giving away wealth. That's why we activate our purpose to support the financial, physical and emotional well-being of those impacted by health issues, so each person can live an enriching life.

Helping the Terry Fox Foundation *Finish It* in Canada

In 1980, Terry Fox set out to run coast to coast across Canada to raise awareness and money for cancer research. Ever since, the Terry Fox Foundation has been committed to finishing what he set out to do and ending cancer as we know it.

Running with purpose: With so many of our clients and associates impacted by cancer, Team Edward Jones is proud to be a leading supporter of the Terry Fox Foundation. Each year we raise the stakes by supporting runs, golf events and other fundraisers in communities throughout Canada.

More than **350,000 CAD raised** in 2025 through corporate and associate giving to support the Terry Fox Foundation in Canada

Creating a sustainable future through a commitment to conservation

By celebrating what would have been Ted and Pat Jones' 100th birthdays in 2025, we carry on their legacy of caring for the land and stewarding the environment throughout our firm.

We started our efforts in 2025 when we subscribed our home office locations to WELL at scale implementing strategies from the WELL Standard and achieving third-party verification of existing programs. The WELL Standard is a framework designed to enhance human health and well-being in buildings through evidence-based strategies and design interventions. We will look to extend this practice to select branches and new builds in the near future.

Partnership in Action: Investing in our communities

Through our partnership with **New Leaf Climate Partners,** we're co-developing innovative approaches to help small businesses and working landowners advance conservation and build the long-term financial resilience needed to anchor vibrant communities.

Learn more about how we're planting for positive impact

Edward Jones and the Arbor Day Foundation

Our ongoing relationship with the Arbor Day Foundation reached new milestones in 2025 as we zeroed in on making a positive impact in vital ecosystems through reforestation efforts.

More than
170K trees planted

369 acres restored

More than 400
metric tons of CO2 sequestered[7]

9.8 million gallons of water runoff avoided[7]

More than 100,000 tons
of air pollutants removed[7]

Leading with transparency

Our four core values guide us: Our clients' interests come first; we believe in a quality-oriented, long-term investment philosophy; we value working in partnership; and individuals and their contributions are valued and respected. These values come to life through our Culture of Compliance, which includes:

- **Our Code of Ethical Conduct,** which defines the ethical standards and principles that guide our conduct across the entire firm, as well as routine ethics trainings.
- **Our Culture of Compliance program** empowers field associates to lead and educate their regions to mitigate compliance risks while maintaining the highest professional and ethical standards. Regular development sessions help build their compliance IQ, including sessions on fraud and senior client protection.

*Photo credit: Aspen Ideas Festival

An efficient governance structure helps us deliver more value to more clients and families in more communities.

- **The firm's Enterprise Leadership Team** guides our vision, strategy and executive operations while advising the Managing Partner.
- **The Audit and Risk Committee** oversees our independent auditor, financial reporting, internal controls, enterprise risk management and cybersecurity programs.
- **The Investment Committee** evaluates capital proposals and strategic investment opportunities, ensuring well-informed, structured decision-making aligned with enterprise strategy.

Our Advisory Board provides insight and guidance based on their diverse expertise and experiences that create a unique perspective as we work together to shape our impact. It is not a governing body and does not have formal decision-making authority.

> "The work of the Advisory Board has reaffirmed the enduring culture of purposeful change — anchored in our deep-rooted values — which has always strengthened Edward Jones, made it distinctive, competitive and a positive force in our society."
>
> — Luis Ubiñas, Vice Chair, Advisory Board

About Edward Jones

Our purpose: To partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society.

Our home office locations: St. Louis, Mo.; Tempe, Ariz.; and Mississauga, Ontario, Canada

$18 billion
total annual revenue

Approximately
25,000
full-time and part-time client support team professionals

More than
9 million
clients

$2.5 trillion
in assets under care

Nearly
15,000
branch locations throughout North America

Approximately
55,000
associates

More than
20,000
financial advisors

Improving the lives of our clients	**2021**	**2022**	**2023**	**2024**	**2025**
Supporting our clients' financial stability					
Education savings: # of 529 plans offered through product partners	21	21	21	22	**23**
Education savings: # of accounts participating in 529 plans	*	*	863,000	876,000	**892,000**
Retirement preparedness: assets under care for workplace retirement plans	*	*	$84.9B	$96B	**$106.9B**
Next-gen education: learners reached through Financial Fitness programs in the U.S. and Canada (cumulative since 2020)	365,700	436,000	>848,000	>1M	**>1.2M**
Offering our clients opportunities to invest and give with impact					
Values-based investing: total sustainable and values-based mutual funds and ETFs (# of funds)	117	133	143	163	**173**
Donor-advised funds: amount invested by Edward Jones' clients in the Edward Jones Charitable Gift Fund ($)	$225M	Approx. $350M	Approx. $535M	$786.9M	**>$639M**
Donor-advised funds: amount granted to charities supporting causes or communities, advised by donor's recommendations ($)	$7M	>$57M	>$90M	$182.7M	**>$283M**
Protecting client data					
Privacy and fraud prevention: senior client protection (# of cases)	726	1,372	>4,200**	>6,400	**>6,800**
Security and client protection: training (# training hours)	*	*	*	>145,000	**>149,000**

Improving the lives of our colleagues					
Helping colleagues develop their careers					
CFP® Professionals: # of associates earned CFP® and/or ChFC® designation	*	*	Approx. 1,000	>1,000	**Approx. 1,000**
New practice models: # of Financial Advisors in new practice models (U.S.)	*	*	>1,600	>2,900	**>5,100**
New practice models: % of multi-financial advisor locations (Canada)	*	*	*	22%	**25%**
Supporting our colleagues' well-being					
Associate benefits: % of eligible associates contributing to their retirement through the firm's profit sharing and 401(k) plan	94%	94%	94%	94%	**94%**
Associate benefits: average associate contribution to 401(k)	7.92%	8.04%	8%	7.87%***	**7.74%*** **
Disaster relief assistance: amount distributed to associates in need ($)	$328,000	Approx. $200,000	Approx. $242,000	Approx. $28,000	**Approx. $131,000**
Creating an inclusive firm for all					
Business Resource Groups: number of firm-sponsored, associate-led BRGs	*	12	12	12	**12**
Business Resource Groups: number of associates in BRGs	*	*	Approx. 5,000	Approx. 6,000	**Approx. 6,300**

Bettering our communities and society	2021	2022	2023	2024	2025
Empowering our communities					
Financial contributions: contributions through Edward Jones corporate, Edward Jones Foundation and associate giving ($)	>$26M	>$34.3M	$46M	$47.4M	**$46.9M**
Organizations supported: number of community organizations contributed to	259	319	>5,000****	>10,800****	**>6,000********
Volunteering: number of volunteering hours logged	*	*	*	>308,000	**321,800**
Protecting the environment*****					
Number of trees planted	*	11,250	25,000	>64,000	**>170,000**
Supporting health advancements					
Advancing Alzheimer's research: funds raised for the Alzheimer's Association ($)	Approx. $6M	Approx. $6M	$5.9M	$6.5M	**$6.7M**
Finding a cure for cancer: funds raised for the Terry Fox Foundation (CAD)	>200,000 CAD	>180,000 CAD*	>258,000 CAD	>346,000 CAD	**>350,000 CAD**
Contributing to the economy					
GDP contribution ($)	$20B	*	$25.4B	$25.9B	**$30.1B**
Community jobs supported	Approx. 140,000	*	163,835	>154,000	**Approx. 166,000**

*Data was not published in or has been updated since the prior year's report.
**Criteria for a senior protection case expanded in 2023.
***2024 and 2025 represent full-time associates only.
****Includes associate philanthropic support.
*****Category was included as part of stakeholder materiality assessment but not rated as most relevant to our stakeholders.

Forward-looking statements

This report contains forward-looking statements within the meaning of the U.S. federal securities laws. You can identify forward-looking statements by the use of expressions that predict or indicate future events and trends that do not relate to historical matters. You should not rely on forward-looking statements because they involve known and unknown risks, uncertainties and other factors, some of which are beyond the control of Edward Jones and its parent, The Jones Financial Companies, L.L.L.P (the "Partnership"). These risks, uncertainties and other factors, including those described in the Partnership's filings with the U.S. Securities and Exchange Commission, may cause the actual results, performance or achievements of the Partnership to be materially different from the anticipated future results, performance or achievements expressed or implied by the forward-looking statements contained herein.

Thank you for helping us improve the lives of our clients and colleagues and better our communities and society.

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[1]Includes full-time and part-time employees and partners, including financial advisors.

[2]The Edward Jones and Age Wave Thought Leadership Study, The Four Pillars of the New Retirement, 2020.

[3]The Pulse of North America research from Edward Jones, in partnership with Cerulli Associates, 2025.

[4]Research from Edward Jones in partnership with Morning Consult, 2025.

[5]Investors should understand the risks involved in owning investments, including interest rate risk, credit risk and market risk. The value of investments fluctuate and investors can lose some or all of their principal. Investing with a purpose is a personal choice. Investors can build a well-diversified portfolio with or without a sustainable or values-based strategy. An investment strategy that prioritizes a non-financial goal ahead of traditional fundamentals or financial returns may result in increased volatility and experience underperformance when compared to traditional strategies. Sustainable investing is a subjective practice and some of the criteria Edward Jones may use to identify investments as sustainable may not align with criteria of all clients.

[6]2020 AARP Caregiving in the U.S. Report.

[7]Estimated impact metric projected over a 40-year outlook, configured by the Arbor Day Foundation using i-Tree Tools.