

# Partnering for positive impact

2022 Edward Jones Purpose, Inclusion and Citizenship Report

Edward Jones



## About this report

Edward Jones, a Fortune 500\* company headquartered in St. Louis, provides financial services across the U.S. and, through our affiliate, in Canada. Every aspect of the firm's business caters to serving individual investors and business owners in a human-centered and complete way – helping them put their purpose into action and achieve financially what is most important to them and their families. As of December 31, 2021, the firm's 18,823 financial advisors, along with their branch teams, serve more than 7 million clients with more than \$1.8 trillion in assets under care. Visit [edwardjones.com](https://edwardjones.com) or the recruiting website at [careers.edwardjones.com](https://careers.edwardjones.com) for more information. Member SIPC.

This Purpose, Inclusion and Citizenship Report highlights some of the many ways Edward Jones brought our purpose to life through our culture throughout 2021 and our plans for 2022. In its fourth installment, the report reflects the achievements of our approximately 50,000 associates throughout North America as we collectively pursue our purpose: To partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society. Our purpose and the initiatives brought forth in this report are critical to the success of our branch teams and to ensuring that our firm is sustainable for the next 100 years.

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\*Fortune 500, published May 2022, data as of December 2021.  
Compensation provided for using, not obtaining, the rating.



# A letter from Penny Pennington



Welcome to our 2022 Purpose, Inclusion and Citizenship Report: Partnering for Positive Impact. As we celebrate 100 years of history and look to the next 100 years, Edward Jones continues to put our purpose in action, making a positive impact for our clients, colleagues, communities and society. We do it by

partnering with our clients, one another and with organizations that share our passion and our purpose. Together, we have an ability to impact and enable future generations.

Our purpose – to partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society – is brought to life in this report in three areas of impact. All of this is being achieved through new ways of working and demonstrated through our five culture mindsets: Leadership, Place of Belonging, Continuous Learning, Effective Decision-Making and Growing Our Impact.

**Partnering for Lasting Financial Strength** reflects our belief in the power of financial knowledge and a personal approach to building long-lasting financial strength. Our nearly 19,000 financial advisors serve more than 7 million clients in approximately 3,000 communities across North America every day. We strive to provide access to financial knowledge for clients and help people connect to their own purpose and achieve things in their lives they might not have known were possible. To date, through our Financial Fitness resources, we've helped reshape the relationship with finances for more than 365,000 people, in person and online, with a goal of reaching 1 million adults and youth by the end of 2025.

We are dedicated to **Promoting Healthier Futures** because we know pervasive health issues stand in the way of people building, maintaining and enjoying financial well-being. In 2021, we continued our long-standing alliance with the Alzheimer's Association®. Together, we enhance programming, provide

educational materials, fund critical research and impact early detection of the disease. Internally, supporting healthier futures for everyone also means ensuring eligible associates and their family members have access to insurance and comprehensive health care, including preventive care and mental health services. And for our clients, it means providing opportunities to make a positive impact on our collective future through sustainable investment options such as donor-advised funds.

**Advancing Inclusive Growth** demonstrates our belief that every person deserves the opportunity to thrive, regardless of where they start in life. That's why we focus on diversity, equity and inclusion – and make intentional investments to lift our communities. We continue to make progress advancing our commitment to expand diversity, equity and inclusion at all levels of our organization. We remain steadfast in fostering a place of belonging for everyone and deepening accountability through our diverse representation goals. Our efforts to foster economic inclusion extend into our communities. We actively collaborate with organizations to make meaningful progress, enabling the St. Louis region, where we were founded 100 years ago, and other communities where we are located to thrive inclusively.

As a firm, we are in an exciting period of transformation, which has no doubt been accelerated in many respects by the pandemic. However, we remain fully dedicated to actualizing our purpose through a multi-stakeholder lens, and we are committed to reporting our goals and our progress with transparency and rigor. Those principles guide us as we make continued investments of our time, talent and treasure in dozens of nonprofit organizations and public institutions that share our ambition and understand our responsibility.

As we reflect on 100 years of positive impact in the communities we serve, we also look ahead, applying what we've learned to continue growing our impact. We believe in the growth of possibility for more lives, across all generations and walks of life.

Together, we will make a difference.

**Penny Pennington,**  
Managing Partner, Edward Jones

# Our purpose in action: 2021 at a glance\*

## Clients:

**73%**

of our client relationships are deeply served\*\*



**\$1.5 billion**

invested by clients in sustainable ETFs and mutual funds

**\$225 million**

invested by clients in the Edward Jones Charitable Gift Fund, and more than \$7 million has already been granted to charities



## Bringing our purpose to life:



## Colleagues:

**22% women and 9% people of color are financial advisors**

in the U.S. and Canada - increases for both over last year demonstrating progress toward achieving representation goals by the end of 2025

**\$328,000 in disaster relief assistance**

distributed to 76 associates and families from associate and retiree contributions

**\$10 billion**

value in savings in associate retirement accounts - supported by Edward Jones' profit-sharing contribution and retirement match



## Communities:

**7.2 million pounds of paper saved**

through electronic delivery of client statements, promoting a reduction of more than

**64 million pounds** of CO<sub>2</sub>e



**>\$26 million**

contributed through corporate, Edward Jones Foundation and associate philanthropic support to 259 organizations

**~175,000 participants**

reached in person and online through Financial Fitness educational programs - including more than 25,000 high school students

**>\$30 million**

raised through corporate and associate giving since 2016 to support the Alzheimer's Association and the fight to end Alzheimer's disease

**>200,000 Canadian dollars**

committed to The Terry Fox Foundation through corporate and associate giving as part of the inaugural Edward Jones Canada national purpose alliance

\*All data is as of December 31, 2021. \*\*"Deeply served" is a measure of the depth of client relationships that includes documenting client goals, risk tolerance and portfolio performance, and then implementing tailored solutions by way of investments, insurance and services.



# 100 years of positive impact

Edward Jones turned 100 on January 28, 2022, marking a century of serving clients and communities, continuously growing and evolving to become the successful firm we are today.

To honor those who have made this milestone possible - our clients, colleagues, communities and business partners - we have planned a yearlong commemoration that brings our purpose to life, celebrates our past and looks forward to the growth of our impact, all the while continuing to reinforce and strengthen our culture. This includes sharing our story, from our humble beginnings to who we have become today: a firm making a meaningful difference in the lives of our more than 7 million clients and approximately 50,000 associates in communities across North America.

The following is an excerpt from the book *The Business of America is Business*, featuring Edward Jones, by Robert L. Shook and Carrie Coolidge, Phaidon Press.

Although the company is now entering its second century, and its founder, Edward Jones Sr., and his son Ted might be bewildered by the advances in technology at the firm, there are many things that would be familiar to them. The Joneses would recognize the firm’s ambition of maintaining a sense of empathy, value delivery, and service to its clients, as these goals have remained intact at the firm since its earliest days.



“We see ourselves as part of the fabric of every community where we serve and in every community where our headquarters locations are,” Penny Pennington says. “We partner with other stakeholders who share our purposeful intention to make a difference in people’s lives. We don’t want to do it alone, and we can’t do it alone. We know that by pulling together the fabric of our communities, of our families, of society, and partnering within our domains of expertise, we can come up with integrated solutions that make a difference for individual families that provide equity in terms of access to information, financial literacy, and all the ways that families can recognize the possibilities in their own lives. We as businesses, as regulators, as community organizations can partner to improve their lives.”

# Spirit of Caring award: Handcrafting a culture of purpose

Since 2010, the annual Ted Jones Spirit of Caring Award has gone to one financial advisor and one branch office administrator in every one of the firm’s regions who best exemplify Edward Jones’ values, culture and spirit of giving back. This award extends beyond typical performance standards and honors those who have reached the highest level of giving back to other financial advisors, branch teams, their region and the firm.

The story of each recipient is as unique as the physical award itself: each one is handcrafted from wood harvested directly from the farm of Ted and Pat Jones.

The awards are made by a small group of Edward Jones associates who volunteer their time and woodworking expertise. Led by 30-year Edward Jones veteran Jim Jansen, it takes approximately 40 minutes to create each award, and hundreds are made each year. Here’s the process in Jim’s words:

“The first year, I built all the awards myself. But now there is a team of us who work together to cut up the trees and make the awards.

“Whenever a tree falls or dies, the farm caretaker lets me know. The pine trees on the land are now between 50 and 60 years old. After the trees are milled into boards, we store the lumber for about two years while it dries. Every year we select dried boards to run through a planer to thin and smooth the wood, hand draw the template, drill press and route each piece. In total, it takes about seven steps done in batches.”



The story of each recipient is as unique as the physical award itself: each one is handcrafted from wood harvested directly from the farm of Ted and Pat Jones.





# Partnering for lasting financial strength

We believe in the power of financial knowledge and a personal approach to build long-lasting financial strength. That's why we create deep relationships and provide tailored resources to educate and support people in creating intergenerational wealth for themselves and those around them.





## Building greater financial resilience

In 2020, Edward Jones launched our Financial Fitness educational curriculum in conjunction with EVERFI. With a goal of building financial knowledge and confidence, we aim to address financial health by reshaping conversations around money in younger generations. We have a goal of impacting 1 million adults and youth by the end of 2025. In 2021, we reached more than 25,000 students at 575 high schools, 52% of which are high-need schools. More than 149,000 individuals participated through online learning at [edwardjones.com/financialfitness](https://edwardjones.com/financialfitness).

We also expanded the curriculum in collaboration with St. Louis Community College and their various academic program affinity groups, including the Black Male Achiever Academy, Phi Theta Kappa Honor Society and TRIO, a federal outreach and student services program targeted to serve and assist low-income individuals, first-generation college students and individuals with disabilities to progress through the academic pipeline. Ten Edward Jones financial advisors taught more than 12 in-person and virtual classes. Classes focused on helping participants understand financial basics such as saving, spending and borrowing, and the principle that, with guidance, they can create opportunities to financially empower themselves and their families.

In addition, we help more than 7 million clients and estimate that 40% of our clients are confident in their financial futures versus 19% of investors, according to a survey of 600 clients and 600 investors conducted by Edward Jones Client & Investor Research (October 2021). We continue to look for ways to measure our efforts, including a four-year longitudinal study exploring the impact of the Financial Fitness curriculum. The study is set to kick off in 2022 and seeks to better understand the financial needs of students and how they are applying their new financial knowledge as they move from school into the workforce.

“Financial Literacy is so important, and the sooner an individual can gain financial knowledge, the better their relationship will be with money.”

**Rhonda R.**, St. Louis Community College Staff Member

### 2021 Financial Fitness by the numbers:

(Data as of December 31, 2021)

#### High school:

**>25,000**

high school students engaged

**575**

high schools engaged –  
52% high-need schools

**>23,000**

hours of financial education provided by associates about being financially knowledgeable, confident and resilient

#### Online:

**>149,000**

online visitors

**12 minutes,  
29 seconds**

average time on site

**27%**

of site visitors opened other pages on the Edward Jones website

#### College:

**>12**

classes taught by Edward Jones financial advisors

**>100**

college students and staff reached

**11.5%**

average knowledge gain, measured by pre- and post-curriculum surveys

## Advocating for a secure retirement

The Grassroots Task Force is our voice for the individual investor in our nation's capital. It is also the securities industry's only volunteer advocacy organization that travels to Washington, D.C., to speak out on issues of importance to the individual investor. The Grassroots Task Force is comprised of financial advisor and branch office administrator chairs in all 50 states who foster relationships with and educate elected officials to ensure they understand how legislative and regulatory proposals could impact individual investors. The Grassroots Task Force is currently advocating for bipartisan retirement savings legislation to help millions more Americans save for a secure and dignified retirement.



Financial Advisor Scott Barr, chair of our Grassroots Task Force, testifies on Capitol Hill from his Zanesville, Ohio, branch office.

### Creating a path to more affordable access to education

Despite increasing student debt and rising college tuition, only one-third of people in the U.S. recognize a 529 plan as an education savings tool, according to a 2021 study conducted by Edward Jones. In the same survey, only one-fifth of parents nationwide reported they have saved or are planning to save for theirs or their children's education using a 529 plan, even though saving for education remains a top three financial priority for many.

At Edward Jones, our financial advisors discuss evolving financial priorities with clients, including, for example, saving for education through various investment vehicles, such as a 529 plan.

Edward Jones offers

**21 plans for 529s**

**>800,000 accounts** participate in 529 plans

**\$17.5 billion**

in assets under care in 529 plans,

**#2 in the industry**

based on assets under care (as of December 31, 2021)

Tax issues for 529 plans can be complex. Please consult your tax advisor about your situation. Edward Jones, its financial advisors and associates cannot provide tax or legal advice.

## Culture mindset: Growing our impact

### Caring for our clients to and through the new retirement

In 2019, Edward Jones collaborated with Age Wave on a study titled “The Four Pillars of the New Retirement.” Following this study, we created a new, comprehensive framework to help people live well to and through retirement by considering the challenges and opportunities with four interconnected pillars: health, family, purpose and finances. Recognizing these extraordinary times, we introduced a new study in 2021 to track how the pandemic disrupted lives, how Americans are faring across all four pillars and what’s next in the “new retirement.” The study findings underscore the importance of having financial advice and guidance to help plan and prepare for retirement.



Our financial advisors work with clients to understand what is most important to them, creating unique plans for success based on needs and circumstances.

Among U.S. households ages 45-54,

**42%**

do not have any retirement savings, and the median retirement balance is \$100,000\*

At the end of 2020,

**22 million people**

in the U.S. had stopped making monthly retirement contributions; but by March 2021, that number dropped to 14 million\*\*

In March 2021,

**69 million people**

in the U.S. indicated the pandemic altered their anticipated retirement, with 32% indicating they plan to retire later, while 11% plan to retire earlier\*\*

\*The Federal Reserve, Survey of Consumer Finances, 2019.

\*\*Source: Edward Jones/Age Wave, The Four Pillars of the New Retirement, 2020 (Base: Ages 50+).

Study methodology: This nationally representative survey was conducted online within the United States by The Harris Poll on behalf of Edward Jones and Age Wave from August 12-16, 2021, among 2,020 U.S. adults ages 18+. Results were weighted where necessary to bring them into line with their actual proportions in the population. The March survey was fielded from March 22-24, 2021; the December survey was fielded from December 1-3, 2020; and the May survey was fielded from May 21-June 4, 2020.



## A spirit of caring

### Ashby Dawson, Amarillo, Texas

The spirit of caring at Edward Jones is one that is passed down from generation to generation. Financial Advisor Ashby Dawson of Amarillo, Texas, saw it firsthand through her dad, who was a financial advisor. Now, she carries a spirit of caring every day through the connections she forges and maintains with her clients and her colleagues and in her community.

When Ashby began her career as a financial advisor in 2007, she had the added challenge of building trust with clients amid a recession. She learned quickly trust was developed by listening to and understanding the emotional concerns and fears that people had during that turbulent time. Ashby carried those skills with her as she grew her business. She is a firm believer that connecting with people is not just a foundational part of her business, but is also essential to strengthening the community she's grown up in and still calls home.

Ashby describes what the Spirit of Caring at Edward Jones means to her: "Whenever I nominate someone for the Spirit of Caring award, I think of someone who has treated me most like a member of their family. Someone who mentors people and understands the power of empathy in connecting with others."

Ashby grew up in a home surrounded by family. She learned early on how much connection matters and the value of being able to share meaningful life moments – good and bad – with those around you. She embraces that mentality in her personal and professional life, using her free time to make meaningful connections.

"It's not about money for me, but just to be a guiding voice or soundboard for someone."



**Branch location:** Amarillo, Texas

**FA can serve date:** December 31, 2007

**Branch team:** Senior BOAs Brenda Malamen and Megan Wissler; On-call BOAs Becky Perkins and Alexander Waters

**Number of households served by branch:** >300

**Percent of clients deeply served\*:** 81%

\*"Deeply served" is a measure of the depth of client relationships that includes documenting client goals, risk tolerance and portfolio performance, and then implementing tailored solutions by way of investments, insurance and services.

"Whenever I nominate someone for the Spirit of Caring award, I think of someone who has treated me most like a member of their family. Someone who mentors people and understands the power of empathy in connecting with others."

**Ashby Dawson**, Financial Advisor

# Promoting healthier futures

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We believe pervasive health issues stand in the way of people building, maintaining and enjoying wealth in life. That's why we work to promote the financial and emotional well-being of those impacted by health issues, so each person can live an enriching life.





## A culture of caring for each other

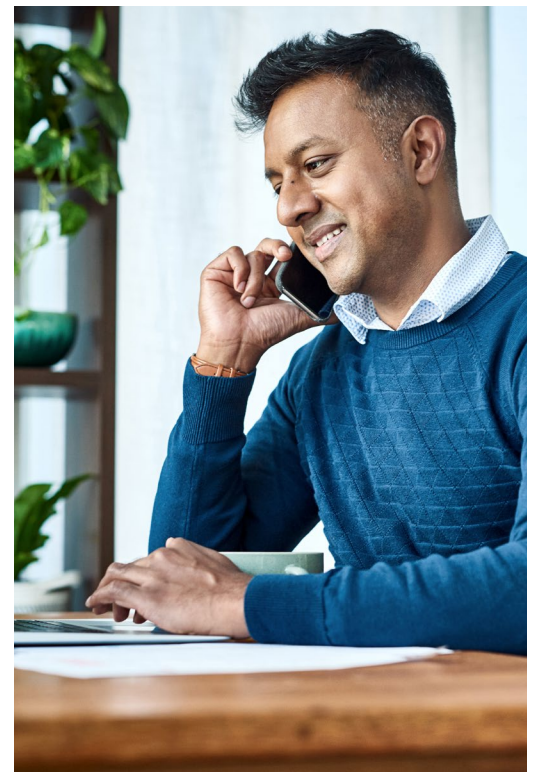
Making a positive impact in the lives of our clients, colleagues and communities starts with the care and support we provide our associates to address their own physical, emotional, financial and social well-being. Utilizing a global well-being solutions provider, Edward Jones gives all associates and their spouses/partners access to resources to help improve their quality of life. Once enrolled in the program, associates who also participate in the firm's health plan can earn medical plan premium discounts and incentives – across all populations of ability and wellness – based on daily activities and program participation. In addition, participants have access to health coaches, who create personalized plans to help participants achieve their goals.

### Edward Jones is committed to offering comprehensive benefits and flexible work to meet the needs of our associates:

- Waived deductibles for testing and treatment of COVID-19 for those enrolled in Edward Jones' health plan
- New programs in support of the emotional well-being of all our associates, including:
  - Connections to online tutors, live online classes and test preparation services by engaging with a vendor to connect K-12 students to the right resource
  - 24/7/365 access to a live Employee Assistance Program (EAP) resource
  - Virtual access to counselors and other mental health providers
- Expanded number of free mental health visits for all associates
- A range of physical activity programs all associates can incorporate into their workday
- Continued flexibility for all associates and work-from-home options for home office associates during the pandemic with increased investments in collaborative technology
- Profit sharing for all eligible associates and a retirement matching program for eligible home office associates and branch office administrators

In 2021, we reached **\$10 billion** value in savings in associate retirement accounts, supported by Edward Jones' profit-sharing contribution and retirement match, providing more financial opportunity for Edward Jones associates.

The firm makes a significant investment in subsidizing health and wellness benefits for associates, including the annual Health Savings Account (HSA) match for participating BOAs, home office associates and transitional financial advisors. For eligible associates, the firm matches HSA contributions annually dollar for dollar up to \$500 for associates or \$1,000 for associates and family enrolled in Edward Jones' health plan. These associates have saved more than **\$240 million** in their health savings accounts with the help of the firm match.







## Ending Alzheimer's, together

Since 2016, Edward Jones has proudly served as a National Presenting Sponsor for the Alzheimer's Association Walk to End Alzheimer's®, which takes place in more than 600 communities each year. Since then, more than 85,000 participants have walked under the Edward Jones banner. The firm and its associates have raised more than \$30 million for the fight to end Alzheimer's disease.

In addition to returning to in-person Walks in 2021, we completed the second year of our renewed, five-year strategic alliance. Our continued support will enhance the Alzheimer's Association's care and support programs, provide educational materials, fund critical Alzheimer's research and impact early detection.

According to a recent Edward Jones and Age Wave survey, Alzheimer's disease is the most feared health condition of later life by U.S. retirees - more than cancer, heart attack, COVID and stroke. We prioritized Alzheimer's as our first national community sponsorship for a multitude of reasons and pledged to raise \$50 million with an estimated 150,000 walk participants for the Alzheimer's Association by the end of 2025.





## Why we walk: Nicole MacLean

Senior BOA Nicole MacLean, from Havertown, Pa., understands firsthand the importance of our relationship with the Alzheimer’s Association. Our efforts play a critical role in supporting research and resources to fight the disease that has impacted her own family and affects an estimated 300,000 Edward Jones clients in the U.S.

“My mom was diagnosed with younger-onset Alzheimer’s disease when she was in her early 60s. When I would visit my folks, Mom seemed normal to me – just a little forgetful. As the years went by, her forgetfulness got worse. In 2013, while he was fighting cancer, my dad started calling me in tears. My mom was being ‘mean’ or was in a ‘foul’ mood. I would talk him down by reminding him that it was the disease and not her. I lost my dad in March 2016.

“I was not prepared. My mom was not my mom. I was her mom. I had to remind her to take a bath, brush her teeth, change her clothes, eat her food, use her walker and so on. I worked 40 hours a week, and while I was at work, she was at a senior care facility that had a very structured daily routine, which she required. When I’d pick her up after work, I’d start my other job of caring for her.

“This disease is awful. It robs not only the one who has the disease of their memories and life, but it robs the family as well. This was so much harder than I ever thought it could be. Not a day goes by that I don’t think about her and wish that I had one more day with her.

“Now it’s my turn. I was diagnosed with younger-onset Alzheimer’s in August 2021. Knowing early has opened some doors for me and allowed me to plan in ways many are unable to. I have a 10-year plan, both medical and financial, and caregivers are already in place. I have been seeking out clinical trials and treatments that are available for those in my stage of the disease progression. I share my struggles with those close to me so they understand what is happening to me.”

“I participate in Walk to End Alzheimer’s for my mom. I walk to help build awareness. I walk to help raise funds so that one day this disease can be eliminated. I walk so one day no other family will ever have to watch their loved one slowly disappear into a world we can’t understand. That’s why I work to help fight Alzheimer’s.”

**Nicole MacLean,**  
Senior BOA



## A marathon of hope: The Terry Fox Foundation

Giving back to the communities where we live is an important part of our culture. In early 2021, we enthusiastically announced our support of The Terry Fox Foundation in Canada. Our contribution of more than 200,000 Canadian dollars, raised through both corporate and associate giving, will support the organization's mission to find a cure for cancer by funding outstanding research.

Terry Fox was 18 when he was diagnosed with osteosarcoma (a form of bone cancer) and forced to have his right leg amputated in 1977. On April 12, 1980, Terry dipped his artificial leg in the Atlantic Ocean and began his Marathon of Hope, a cross-country run with the ambitious goal of raising \$1 from every Canadian (\$24 million). After 143 days and 3,339 miles, Terry stopped running outside of Thunder Bay, Ontario. His cancer had spread to his lungs, and he tragically passed away nine months later. Today his legacy lives on, and The Terry Fox Foundation has raised over \$850 million and funded 1,300 innovative cancer research projects, bringing hope and health to millions. The foundation funds all types of cancer research projects, with a focus on the most difficult and incurable cancers.



### Carrying Terry's torch

Five years ago, Financial Advisor Keith Haigh's practice in Victoria, British Columbia, was struck by cancer. Keith's wife, Jane, was diagnosed with malignant breast cancer, and his BOA Dana Bryant's husband, Scott, was diagnosed with pancreatic cancer. "In the space of a month, we went from being everything normal, business is great, into complete panic mode," Keith said. In 2021, Jane received the five-year "all clear." However, despite receiving top-notch care, Scott died of stage 4 cancer.

The contrasting experiences of Jane and Scott showed Keith that while so much progress has been made in fighting this terrible illness, we still have so much further to go. When Edward Jones announced the firm would be supporting The Terry Fox Foundation, Keith quickly volunteered to be a regional champion. Jane and Scott's stories have become a rallying point for their whole region as they fundraise to help cure cancer.

"When you've been on the receiving end of any of these things, there's both an obligation and a desire to do the right thing because it's going to happen to many other people, it's going to happen to people in our region: clients, colleagues, friends. It's not going away any time soon. The marathon goes on. For all of us at Edward Jones who have decided to help, we're carrying Terry's torch, we're continuing the Marathon of Hope."

**Keith Haigh**, Financial Advisor



# Creating a more sustainable future

Through the firm's history of conservation, including our commitment to the Katy Trail, and innovations such as sustainable investing, donor-advised funds, reducing paper consumption through e-delivery and improving air quality by planting trees, Edward Jones is creating a more sustainable future for all.

## Sustainable investing

Many studies show individual investors are increasingly interested in investing with purpose and making a positive impact with their money. In fact, 33% of total assets under professional management in the U.S. - that's one out of every three dollars - is already being invested using some type of sustainable strategy, according to a 2020 report from U.S. SIF: The Forum for Sustainable and Responsible Investment. We are seeing this firsthand - our assets under care related to sustainable investments increased 53% year-over-year.

At Edward Jones, we believe sustainable investments can help our clients achieve their financial goals as part of a diversified portfolio. There is growing recognition environmental, social, governance (ESG) risks may impact long-term corporate performance, and we have taken steps to incorporate sustainable considerations into our research teams' investment processes.

As investor preferences change, demand for sustainable mutual funds and exchange-traded funds (ETFs) may change. We continue to enhance our sustainable investment research and advice, and collaborate with many of our product partners to offer a wide array of sustainable investment solutions to our clients and investors.



**36 new**

sustainable mutual funds and ETFs offered in 2021 to our clients and investors



**117**

sustainable mutual funds and ETFs offered at the end of 2021



**\$1.5 billion**

invested by clients in sustainable mutual funds and ETFs in 2021 (as of December 31, 2021)



The firm's sustainable investment offerings represent a mix of active and passive investing strategies across asset classes, available in mutual funds and ETFs. These include sustainable and values-based products. Some but not all of the assets are linked to products that invest according to the United Nations Sustainable Development Goals (SDGs).

Mutual fund and exchange-traded fund investing involves risk. Your principal and investment return will fluctuate in value. Your investment, when redeemed, may be worth more or less than the original cost. Mutual funds and exchange-traded funds are sold by prospectus. The prospectus contains more complete information, including investment objectives, risks, and charges and expenses as well as other important information that should be carefully considered. Your financial advisor can provide a prospectus, which should be read carefully before investing.

## Reducing paper consumption

Edward Jones has an expansive home office and branch real estate portfolio. In our home offices alone, 2.2 million square feet is designed for associate office, training and data center use. As a consumer of natural resources and a responsible citizen, we are evaluating long-term investments to operate in more environmentally sustainable ways. Our desire to lead with purpose extends to improving the quality of life for our associates and neighbors and minimizing our overall environmental impact for the sake of future generations.

We're continuing our commitment to sustainability through advancements in our digital strategy to reduce paper consumption. We've seen an increase in clients choosing electronic delivery of documents from 37% in 2019 to 57% at the end of 2021. Not only is this a better client and branch experience, every 1% increase represents \$1 million of annual recurring expense savings for the firm, allowing us an additional opportunity to invest in our communities and causes important to our clients and colleagues.

In 2021, Edward Jones saved a total of 7.2 million pounds of paper through electronic delivery, promoting a reduction of more than 64 million pounds of CO<sub>2</sub>e. Thanks to these efforts, our paper reduction saved the equivalent of more than 85,800 trees – that's nearly five times the total number of trees in Central Park. Edward Jones' paper reduction efforts have provided an estimated \$76 million in total savings in 2021.

## 7.2 million

pounds of paper saved through electronic delivery of client statements, promoting a reduction of more than 64 million pounds of CO<sub>2</sub>e in 2021\*

## Improving air quality by planting trees

Trees are the most scalable and affordable natural solution to neutralize the ever-increasing negative side effects of climate change. Trees remove pollution and carbon dioxide from our atmosphere, purify our water supply, benefit wildlife, cool cities, increase property values and improve overall health and well-being. In 2022, we plan for our support for good causes to include a collaboration with the Arbor Day Foundation.

As a firm, in 2022, we plan to engage our clients and colleagues to plant trees in rural and metro areas including: Atlanta, Charlotte, Cleveland, Dallas-Fort Worth, Denver, Kansas City, Los Angeles, Raleigh-Durham, San Diego, Tempe/Phoenix and St. Louis. Through this collaboration with the Arbor Day Foundation, we pledge to plant or sponsor the planting of 10,000 trees during our centennial year – deepening relationships as we preserve and protect the environment. We plan to monitor the environmental impact of the trees over 40 years, including CO<sub>2</sub> captured, air quality savings and stormwater runoff reduction.



## Investing in communities with donor-advised funds

The Edward Jones Charitable Gift Fund is helping our clients leave a legacy through a donor-advised fund (DAF). A DAF is a charitable giving tool that allows our clients and investors to make an irrevocable contribution to the fund and receive an immediate tax deduction. Over time, clients can request distributions be made to IRS-approved public charities and maximize their charitable impact, investing their contributions and growing their charitable gifts over time, tax free.

Financial Advisor Nanette Fahrenbruch from Lakewood, Colo., says: "Over the years, I'd have many conversations with my clients about how important charitable giving is to them. And that is true for clients of all income levels, net worth and personal needs. Now I am finding that conversations with clients and their tax professionals have become even more frequent and strategic around charitable giving. A solution like a donor-advised fund helps our clients give in a more efficient and effective way to causes that matter most to them."

**As of December 31, 2021, Edward Jones clients invested \$225 million in the Edward Jones Charitable Gift Fund in 2021, and more than \$7 million has already been granted to charities, enabling them to make an impact in their communities aligned to their own purpose.**



# A spirit of caring

## Cynthia Wemyss, Los Altos, Calif.

When Cynthia Wemyss joined Edward Jones in 1999 following a career change, she quickly recognized a firm that cared deeply about helping people in her community. She saw a spirit of caring at Edward Jones long before the award even existed.

“When I joined Edward Jones, there were so many people that took time to help me succeed. For a while, I thought it was too good to be true. But it has just continued. I’m so grateful to be part of this partnership. For everyone that gave back to me, I want to pay that forward.”

Coming from a previous career in Middle East petrochemical sales, she was also all-too-familiar with male-dominated industries. In the last 23 years, Cynthia has been a driver of change at Edward Jones, helping to elevate more women into positions of leadership, creating a more inclusive place to work. As an Area Women Inclusion Leader, she works to increase awareness and to help drive recruitment and leadership to better represent women.

“First, I am a financial advisor, and I happen to be female. As a female, I believe we just want the same resources and responsibilities as anyone else.” Cynthia continued, “We have to be sure that everyone is being included. We don’t have to make it complicated.”

Cynthia summed up her Spirit of Caring experience: “This award is not based on numbers; it comes from the heart of my colleagues. To me, that means everything. In my opinion, the heart of Edward Jones is our culture of caring for our clients, colleagues and the communities we serve. If every associate is selected to receive this award during their career at Edward Jones, we can all be confident the heart of the firm will continue to beat and thrive for another 100 years and beyond.

“The great thing about being a part of Edward Jones is you have so many great teammates. You never have to go it alone.”

“This award is not based on numbers; it comes from the heart of my colleagues. To me, that means everything.”

**Cynthia Wemyss**, Financial Advisor



**Branch location:** Los Altos, Calif.

**FA can serve date:** May 17, 1999

**Branch team:** Senior BOAs Keith McGinnis and Nicole Huber; On-call BOAs Nicole Wemyss and Alyssa Wemyss

**Number of households served by branch:** >350

**Percent of clients deeply served\*:** 85%

\*“Deeply served” is a measure of the depth of client relationships that includes documenting client goals, risk tolerance and portfolio performance, and then implementing tailored solutions by way of investments, insurance and services.

# Advancing inclusive growth

We believe every person deserves the opportunity to thrive - regardless of where they start. That's why 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.





# A place of belonging results from recognizing the worth and value in each of us

At Edward Jones, we know progress depends on our collective hard work and everyday actions to work together toward true equity. Our commitments to diversity, equity and inclusion, including a five-point commitment in the U.S. and a four-point commitment in Canada, diverse representation goals and our everyday ways of working are all part of the important efforts to build a truly equitable culture at Edward Jones.



## Advancing equitable hiring, training, promotional practices and policies to progress toward greater diverse representation in U.S. and Canada by the end of 2025:

	Current	2025 Goals
U.S. and Canadian financial advisors of color:	9%	15%
Female U.S. and Canadian financial advisors:	22%	30%
People of color in leadership* in the firm's U.S. and Canada headquarters:	17%	20%
Female leadership in the firm's U.S. and Canada headquarters:	49%	50%
General partners of color in U.S. and Canada headquarters:	12%	15%
Female general partners in U.S. and Canada headquarters:	31%	40%

\*Leaders include leaders of leaders and leaders of associate roles. All percentages are as of December 31, 2021.



### Meet Jennifer Kingston

In 2021, Edward Jones named Jennifer Kingston Head of Diversity, Equity and Inclusion (DEI). She leads a growing team working to build a stronger, better Edward Jones through our diverse workforce, enabling us to grow our impact on our clients, colleagues and communities. As we work to create equity and a place of belonging where all associates feel valued and are able to thrive, we are creating a place where we come together to help people achieve what matters most.

“I am honored to lead our diversity, equity and inclusion work into its next phase, where everyone can achieve their full potential and where all dimensions of diversity are respected and celebrated. From building broad capabilities like establishing a supplier diversity framework, to seemingly simple yet intentional steps of solidarity, we are taking actions to ignite potential,” says Jennifer Kingston. “While we are excited about hiring more diverse talent, there is a lot of focus on the retention, development and advancement of our current teams. We will have failed if we reach our diverse representation goals by only hiring external leaders. We are committed to providing resources, opportunities and support to break through barriers, increase retention, lead and pave a bold path forward, and we’re already seeing positive results through metrics such as attrition rates among financial advisors of color.”

Jennifer has been with Edward Jones since April 2019. Her 2022 DEI priorities for the firm include inclusive hiring, retention, development and advancement by enhancing our diverse talent pipeline, supporting community relationships to build equity in local communities and expanding branch team training to ensure we are meeting the unique needs of our clients.

## Culture mindset: Continuous learning

### Deepening understanding for a more equitable future

In Fall 2021, more than 350 leaders from the field and our home offices came together virtually at Edward Jones’ inaugural Diversity, Equity and Inclusion Conference to recognize inclusive leadership, strengthen our growth mindset and foster a place of belonging where everyone can feel comfortable bringing their full selves to work.

During the three-day event, firm leaders, peers and DEI experts – including Kenji Yoshino, Chief Justice Earl Warren Professor of Constitutional Law at New York University School of Law and author of *Covering: The Hidden Assault on our Civil Rights* – engaged in dialogue on the importance of being intentional about diversity and its critical role in business.

Serving as a session host, Chief Information Officer Frank LaQuinta appreciated the emphasis on meeting people where they are and bringing a “learn-it-all,” not “know-it-all,” attitude.

“Making meaningful progress around DEI is additive not just for individuals but communities and society. This work is central to the way we’re living our purpose as a firm – to partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society.”

**Frank LaQuinta**, Chief Information Officer



## Our ways of working

At Edward Jones, we are purpose-driven, leader-led and team-based. DEI practices are embedded into the fabric of our firm, including how we solve problems and deliver for our clients. Talented colleagues from across our organization come together regularly to develop innovative ways to evolve and improve our processes, systems and culture through the work of our Business Resource Groups (BRGs), mentorship programs and other initiatives. These activities, combined with our culture mindsets, are critical to ensuring Edward Jones is a place of belonging for all. Some of the many examples of how this comes to life include:

Promoted in 2021 to director of executive staff integration in the Managing Partner's Office, **Kevin Buie** exemplifies the power of formal and informal mentorship programs. He recently participated in the St. Louis Business\* Diversity Initiative's Fellows Experience, a long-standing alliance the firm has maintained to nurture and mentor executives of color to accelerate career progression and increase positive impact on the Greater St. Louis area. Along with associates **Edgar Johnson, Dana Rogers, Tasha Sain** and **Kaylyn Truelove**, Kevin saw a gap and created an informal mentorship group to pair Black associates in the St. Louis home office with leaders from various backgrounds and experiences to benefit from diverse perspectives.

Bilingual Financial Advisor **Michele Delawder** of Gray, Tenn., uses American Sign Language (ASL) to converse with her Deaf family members. In less than two years with the firm, Michele has channeled her passion for inclusion and improving conditions for people with disabilities. Her advocacy for strengthening client service and talent recruitment of the Deaf community has already been extremely impactful to recommend practices and policies to better meet the unique needs of Edward Jones clients and colleagues with disabilities. With an acute focus on the needs of the Deaf community, Michele has been an advocate for resources designed to help the marketplace identify which of our branch teams speak sign language.

Associate efforts, guided by a leadership mindset, improve diversity, equity and inclusion and help create a workplace of belonging for all.

\*2021 St. Louis Business Journal Business of Pride, published May 2021, data as of February 2021.

## Culture mindset: Place of belonging

### Kim Grbac recognized for LGBTQ+ advocacy

The *St. Louis Business Journal* recently announced its inaugural class of Business of Pride Awards honorees in celebration of LGBTQ+ leaders and allies who are successful in their careers, active in their communities and advocates for inclusion and equality. Among this year's inaugural class of eight honorees is the firm's head of benefits, Kim Grbac.

Kim is the definition of an exceptional LGBTQ+ equality advocate and ally leader in the workplace. She has been a pivotal, trailblazing executive at our firm, truly effecting meaningful and progressive change - including parental leave for primary and secondary caregivers, flexible work and transgender benefits - that has positively impacted the lives of associates and their families.



# A century of DEI milestones - Creating a place of belonging since 1922



<sup>1</sup>2019 Forbes Best Employers for Diversity, published January 2019, research by Statista, data as of October 2018. Compensation provided for using, not obtaining, the rating.

<sup>2</sup>2018 Best Workplaces for Millennials, published Fortune June 2018, Great Places to Work data as of September 2017. Compensation provided for using, not obtaining, the rating.

<sup>3</sup>2020 Fortune Best Workplaces for Women, published September 2020, research by Great Places to Work, data as of September 2019. Compensation provided for using, not obtaining, the rating.

<sup>4</sup>2020 Fortune's 100 Best Companies to Work For, published February 2020, research by Great Place to Work, data as of September 2019. Compensation provided for using, not obtaining, the rating.



## A spirit of caring

### Thomas Scott Jr., Zachary, La.

Hometown communities are vital to the success of Edward Jones. So, when one of our financial advisors devotes their life and practice to supporting their hometown, our purpose and spirit of caring really come to life. To say Thomas is involved in his hometown is, well, an understatement.

“Well, it’s a lot! I sit on the Board of Directors for the YMCA. I’m a commissioner for the zoning and planning commission for the city.” Thomas went on: “I’ve been on the Chamber of Commerce board of directors for quite some time. I serve on the advisory board for a local bank here in Zachary. And I play the organ currently in four different churches. Oh, and I’m the radio call for the Friday night football games.”

Being an active part of his community has always been important to Thomas. From the beginning, he would show up at community events just to talk to people, building connections and relationships. It’s a mindset and a practice he’s extended across his region, serving as a mentor to many within the firm.

“People that look like me, we traditionally aren’t investing. People of color, diverse individuals, we don’t talk about stocks or investing or money, and I want to change that. It starts with education. And after education, it’s about bringing along your peers, helping people out, giving more people an opportunity to learn and having a seat at the table.”

Thomas shared what he sees as the foundation for caring at the firm: “The spirit is really Ted Jones. It’s how he looked at business, how he looked at the community. When you talk about the spirit of caring, you want to take that to every person you meet. You want every person to see you for who you are, not only what you do.”



**Branch location:** Zachary, La.

**FA can serve date:** March 9, 2015

**Branch team:** FA Dedrick Lewis and Senior BOA Joleen Coolman Oswald

**Number of households served by the branch:** >500

**Percent of clients deeply served\*:** 79%

\*“Deeply served” is a measure of the depth of client relationships that includes documenting client goals, risk tolerance and portfolio performance, and then implementing tailored solutions by way of investments, insurance and services.

“People that look like me, we traditionally aren’t investing. People of color, diverse individuals, we don’t talk about stocks or investing or money, and I want to change that. It starts with education. And after education, it’s about bringing along your peers, helping people out, giving more people an opportunity to learn and having a seat at the table.”

**Thomas Scott Jr.,** Financial Advisor

## About Edward Jones

Edward Jones, a Fortune 500\* company headquartered in St. Louis, provides financial services across the U.S. and through our affiliate in Canada. Every aspect of the firm's business caters to serving individual investors in a human-centered and complete way – helping them put their purpose into action and achieve financially what is most important to them and their families. As of December 31, 2021, the firm's 18,823 financial advisors, along with their branch teams, served more than 7 million clients with more than \$1.8 trillion in assets under care. We strive to deeply serve all our clients by understanding and documenting client goals, risk tolerance and portfolio performance, and then implementing tailored solutions by way of investments, insurance and services. In 2021, we achieved deeply serving 73% of our clients. Visit [edwardjones.com](https://www.edwardjones.com) or the recruiting website at [careers.edwardjones.com](https://careers.edwardjones.com) for more information. Member SIPC.

### Our home office locations

St. Louis, Mo.; Tempe, Ariz.; Mississauga, Ontario, Canada

### Our purpose

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

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▪ Fortune 500, published May 2022, data as of December 2021. Compensation provided for using, not obtaining, the rating.

\*\*"Deeply served" is a measure of the depth of client relationships that includes documenting client goals, risk tolerance and portfolio performance, and then implementing tailored solutions by way of investments, insurance and services.



### Our impact:

**>7 million**  
clients, 73% deeply served\*\*

**15,525**  
branch locations throughout  
North America

approximately  
**50,000**  
associates

**17,515**  
branch office administrators

**18,823**  
financial advisors

**\$1.8 trillion**  
assets under care

**\$12,279 million**  
annual net revenue

All data as of December 31, 2021.





# About Edward Jones

## Our top accolades

- J.D. Power 2022 U.S. Financial Advisor Satisfaction Study – Highest Ranked in Employee Advisor Segment<sup>1</sup>
- 2022 FORTUNE 100 Best Companies to Work For<sup>2</sup>
- 2022 Human Rights Campaign Corporate Equality Index – score of 100<sup>3</sup>
- 2022 FORTUNE Best Workplaces in Financial Services and Insurance<sup>2</sup>
- 2021 Training magazine’s Top 100 (now the APEX Awards)<sup>4</sup>
- 2022 People magazine’s Companies That Care<sup>5</sup>
- 2021 Barron’s Top 1,200 Financial Advisors – 13 Edward Jones FAs ranked<sup>6</sup>
- 2021 Forbes Top Women Wealth Advisors – 3 Edward Jones FAs ranked<sup>7</sup>
- 2022 Phoenix Business Journal Best Places to Work<sup>8</sup>
- 2021 St. Louis Business Journal Business of Pride and Corporate Philanthropy Awards<sup>9</sup>

<sup>1</sup>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.

<sup>2</sup>From Fortune® ©2022 Fortune Media IP Limited. All rights reserved. Used under license. Fortune and Fortune 100 Best Companies to Work for and Fortune 500 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 products or services of, Edward Jones & Co., L.P.

• 2022 Fortune’s 100 Best Companies to Work For, published April 2022, research by Great Place to Work, data as of August 2021. Compensation provided for using, not obtaining, the rating.

• 2022 Fortune Best Workplaces in Financial Services and Insurance, published Fortune September 2022, research by Great Places to Work, data as of August 2021. Compensation provided for using, not obtaining, the rating.

<sup>3</sup>2022 Best Places to Work For LGBTQ+ Equality, Great Place 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.

<sup>4</sup>2021 Training Magazine Training Apex Award, published March 2021, data as of September 2020, an application fee was required for consideration.

<sup>5</sup>2022 People Companies Who Care, published August 2022, Great Places to Work, data as of August 2021. Compensation provided for using, not obtaining, the rating.

<sup>6</sup>2021 Barron’s Top 1200 Financial Advisors, awarded March 2021, data as of September 2020. Compensation provided for using, not obtaining, the rating.

<sup>7</sup>2021 Forbes Top Women Wealth Advisors, awarded March 2021, research by SHOOK Research, LLC. data as of September 2020. Compensation provided for using, not obtaining, the rating.

<sup>8</sup>2022 Best Places to Work in the Valley (Phoenix, AZ), published Phoenix Business Journal December 2022, research by Quantum Workplace, data as of September 2022, application fee required for consideration.

<sup>9</sup>2021 St. Louis Business Journal Business of Pride, published May 2021, data as of February 2021.



# A foundation of giving – our time, talent and treasure

In 2021, we contributed more than \$26 million through corporate, Edward Jones Foundation and associate philanthropic support to 259 organizations across a wide variety of causes. In addition to this critical financial support, more than 10,000 associates served more than 15,000 community organizations across North America.

We anticipate making approximately \$200 million in philanthropic contributions through the end of 2025 in communities across the U.S. and Canada. This is an increase of \$50 million in corporate, Edward Jones Foundation and associate philanthropic support, which was shared in our 2021 Purpose, Inclusion and Citizenship Report.

As a part of that goal – \$200 million by the end of 2025 – we plan to build upon our legacy of community engagement in the St. Louis region, our hometown for 100 years. We anticipate \$80 million in philanthropic giving toward inclusive economic growth and community health and well-being. We are hopeful we will create a model of impact that can be replicated in other communities we call home.

Edward Jones supports several initiatives focused on inclusive economic growth, including the St. Louis Anchor Action Network, Brickline Greenway, the Urban League of Metropolitan St. Louis and others. More detailed information about our involvement can be found in our 2021 Purpose, Inclusion and Citizenship Report.



\$26 million in corporate, Edward Jones Foundation and associate giving contributed to 259 unique organizations, allocated in the following categories:

- 64%** Health & Social Services
- 12%** Education, K-12
- 9%** Culture & Arts
- 6%** Community & Economic Development
- 5%** Education, Higher
- 2%** Civic & Public Affairs
- 2%** Environment





## Culture mindset: Leadership

### Penny Pennington leads by example

In 2021, Penny Pennington proudly served as chair of the American Cancer Society Champions of Hope Gala in St. Louis. Since its inception in 2016, the Champions of Hope Gala has raised more than \$7.6 million to support the mission of the American Cancer Society, including \$1.4 million in 2021 under Penny’s leadership.

**>\$7.6 million**

has been raised by the Champions of Hope Gala to support the mission of the American Cancer Society since its inception in 2016



## United to build wealth and address inequity

### St. Louis Anchor Action Network

We are proud to join with other institutions in St. Louis as a founding member of the St. Louis Anchor Action Network (STLAAN).

STLAAN brings together institutions, companies and community partners to develop and implement successful wealth-building strategies to address long-standing patterns of inequity in our region.

Core to the network is the belief that we can achieve more working together. Community stakeholders and institutional leaders work together, learn from one another and implement impactful strategies designed to increase employment, career development and minority supplier spending in St. Louis. The goal of the intentional investments we make together is to create benefits that will elevate whole communities and ultimately build a stronger and more equitable St. Louis region.





### Coming together to support Core Causes

One of the many ways our associates and the firm came together to bring our purpose to life was through our annual Core Causes campaign. Together, we surpassed our goal, raising approximately \$8.7 million through associate giving and corporate match to benefit the United Way in St. Louis and Tempe and the Arts and Education Council of St. Louis.

### \$8.7 million raised

through associate giving and corporate match in Core Causes campaign benefiting United Way and Arts and Education Council

### When disasters happen, we're there for one another

Whether they're wildfires, hurricanes or global pandemics, federally declared disasters are why the Edward Jones Disaster Relief Fund was created - to help our associates and their families recover with resilience when the unexpected strikes. In 2021, \$328,000 in disaster relief assistance was distributed to 76 associates and families from associate and retiree contributions.

### \$328,000 in disaster relief assistance

distributed in 2021 to 76 associates and families from associate and retiree contributions



### A shining future with Toys for Tots

Delivering hope to less fortunate children exemplifies our purpose. In 2021, we continued our alliance with Toys for Tots, creating more opportunities for our associates to give and providing safe donation drop sites in 162 communities in the U.S.



**255**  
volunteer hours recorded



**9,362 toys**  
collected in 162 communities





## Living our purpose today, **partnering for greater impact in the future**

In 2015, the world's leaders set out on an ambitious path to end poverty, fight inequality and injustice, and protect the planet. The United Nations Sustainable Development Goals (SDGs) provide a framework of action to achieve shared prosperity for the world at large. The SDG framework aims to help align efforts to ensure a more peaceful, healthy and prosperous world for future generations. It has become clear how interconnected the world is and how we all play a critical role in shaping our future. At Edward Jones, we believe that business for good is good for business and society. As we activate our purpose across our organization - throughout our home offices and branch teams, in communities throughout North America - we are making our contribution today and setting our ambition for the future.

We've chosen to respond to some of the most pressing challenges of our time in a way that Edward Jones knows well - through three areas of impact - Partnering for Lasting Financial Strength, Promoting Healthier Futures and Advancing Inclusive Growth. We are working to define outcomes and measures for six of the UN's 17 SDGs, enabling us to grow our impact and deepen our relationships with our clients, colleagues and communities. Accomplishing these outcomes will take exceptional effort, innovation and collaboration. To fulfill our responsibilities and commitments, we hope to align our work on the six SDGs and three purpose focus areas with our business strategy and operations in our three home offices and more than 15,000 branch locations in the U.S. and Canada. The firm is developing a strategy for goals it expects to share in future reporting.



As we activate our purpose across our organization - throughout our home offices and branch teams, in communities throughout North America - we are making our contribution today and setting our ambition for the future.



# Aligning to a strategic framework, benefiting clients, colleagues and communities

We've chosen to respond to some of the most pressing challenges of our time in a way that Edward Jones knows well - through three areas of impact - Partnering for Lasting Financial Strength, Promoting Healthier Futures and Advancing Inclusive Growth. We are working to define outcomes and measures for six of the United Nation's 17 Sustainable Development Goals, enabling us to grow our impact and deepen our relationships with our clients, colleagues and communities.



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Thank you for helping us make a positive impact in the lives of our clients, colleagues and communities.

To learn more about Edward Jones' Purpose, Inclusion and Citizenship efforts, please visit: [edwardjones.com/postiveimpact](https://edwardjones.com/postiveimpact).

To learn more about Edward Jones careers, visit [careers.edwardjones.com](https://careers.edwardjones.com).

### 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 and 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.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.