

Edward Jones®

When purpose meets passion

2020 Corporate Citizenship Report






20,000 strong:
Clients, associates and families who participate in Alzheimer's Association's Walk to End Alzheimer's® annually.

\$2.7M

\$2.7M for COVID-19 relief
from the Edward Jones Foundation in support of associates and communities.

Our 2020 goal for Financial Fitness:
Boosting >100,000 financial IQs, 75 schools and 2,000 hours of learning.

Named for 21 years to **FORTUNE 100 Best Companies To Work For.®**



We proudly serve on **17,000 boards across North America each year.**

100% committed to equity
and a three-time signatory to the CEO Action for Diversity & Inclusion™ pledge.



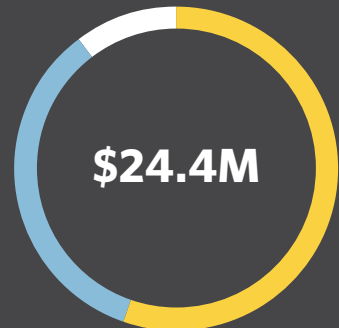
30 years of trail blazing
to maintain the 237-mile Katy Trail, established in 1990 by Ted and Pat Jones.

\$50M

\$50M to fight Alzheimer's
through our 10-year commitment to the Alzheimer's Association.®

Help us serve clients, strengthen communities and improve our planet.
For more information, email us at citizenship@edwardjones.com.

Corporate purpose:
We seek to make a positive impact in the lives of our clients, colleagues and communities.



\$24.4M

Total invested in local communities in 2019:

- \$13.5M** Edward Jones Foundation
- \$8.4M** Associate giving
- \$2.5M** Alzheimer's Association strategic alliance

Letter from Penny Pennington



“There are so many ways to engage with us, whether it’s walking to end Alzheimer’s, COVID-19 relief efforts or our commitment to overcoming racial injustice. Together, we can have a real impact.”

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

Our Stakeholders,

We are pleased to share with you our second annual corporate citizenship report, “When Purpose Meets Passion,” in which you’ll learn how we’re investing in causes that are important to our clients and colleagues as we seek to make a positive impact on our communities and society.

As a purposeful organization, we are serving clients, strengthening communities, championing our associates and protecting our planet in a variety of ways. Though our branch offices were closed to the public for months, we provided uninterrupted service to our clients, helping to guide them through the uncertainty.

One area where you can see our purpose in action is the fight against Alzheimer’s disease. This year we renewed our strategic alliance with the Alzheimer’s Association and committed an additional \$25 million to advance education and research and help families facing the disease. Alzheimer’s robs families of their memories and their finances, two things we work so hard to help our clients nurture.

Through this relationship, we will continue as the national presenting sponsor of the Alzheimer’s Association Walk to End Alzheimer’s,[®] leading more than 600 walks every year. Of course, we walked as individuals or with our families this year, as many of life’s daily activities changed due to COVID-19. We also continued to champion our associates in 2020, deepening our focus on inclusion and diversity and announcing a five-point commitment to address racism and positively impact opportunities for people of color. Through the Edward Jones Foundation, like in 2019, this year we strengthened our communities by providing more than \$13 million to organizations supporting health and social services, the arts, economic development and more.

Finally, our legacy of conservation and philanthropy continues to inspire us to cultivate a culture of environmental sustainability. We are focused on shrinking our carbon footprint, reducing waste and restoring natural habitats.

As proud as we are of this work, we know we don’t do it alone. Our efforts go so much farther when they are amplified by others, and that’s why we ask you to join us in advancing these causes. I look forward to seeing what we’ll do next, in partnership with our clients, colleagues, communities, and you.

In service and partnership,

Penny Pennington, *Managing Partner, Edward Jones*

Serving Clients

We signed up to help end Alzheimer's

Every year, nearly 20,000 Edward Jones clients, associates and family members are proud participants in the Alzheimer's Association Walk to End Alzheimer's. Because this disease hits close to home for so many of us, we come out in force in communities across the country – taking part in over 600 local walks each year.



**With Alzheimer's, it's often personal**

Financial advisor Penny Sanchez, of Virginia Beach, Va., lost her mother to Alzheimer's. Now she's among thousands of Edward Jones associates committed to ending the disease for 5 million+ Americans living with Alzheimer's and the 16 million caring for them.

We work to create a healthy society and to serve as a source of good. Improving the world is central to our purpose.

We care deeply about our clients and put their interests first. Every aspect of the firm's business, from the types of investment options offered to the location of our 15,000 U.S. branch offices, is designed to help serious, long-term individual investors achieve their financial goals. In fact, we serve clients in all but one U.S. county and all 10 provinces in Canada.

To help protect clients' best interests and their financial futures, Edward Jones advocates for causes important to them and to our associates. Our strategic alliance with the Alzheimer's Association is one way we help preserve our clients' health, relationships and financial goals.

Renewing our strategic alliance reinforces our commitment

As the national presenting sponsor of the Alzheimer's Association Walk to End Alzheimer's, we help raise awareness and funds to fuel critical research and support families facing the disease. And in 2019, nearly 20,000 of our clients, associates and their families stepped up and out for this important cause, contributing nearly \$3.5 million.

Edward Jones' strategic alliance with the Alzheimer's Association began in 2016 with a five-year commitment to walk, educate and advocate. In 2020, we announced a renewed five-year commitment of an additional \$25 million to match the \$25 million already raised by our firm.

As the sixth leading cause of death in the U.S., Alzheimer's disease casts a shadow over too many lives. It robs people of their health, relationships and their financial well-being – all the things we work to help protect and preserve at Edward Jones. That's why finding a cure for Alzheimer's disease and other dementia is a cause that's so close to our hearts.

“Edward Jones' diversified approach – spanning from corporate funding of research initiatives to their Walk to End Alzheimer's national presenting sponsorship, associate commitment, AIM membership, and more – is critical in advancing the mission of the Alzheimer's Association.”

– **Harry Johns**, *President & CEO, Alzheimer's Association*



65,000+ stepped up & out:

Clients, associates and their families who walked to end Alzheimer's during our first five years as National Presenting Sponsor of Walk to End Alzheimer's.



Accelerating treatment – and advancing prevention

The Edward Jones Alzheimer's Research Fund makes grants to life-changing research projects presented by the Alzheimer's Association, including:

- The Dominantly Inherited Alzheimer Network (DIAN and DIAN-TU) studies at Washington University in St. Louis, which seek to improve understanding of Alzheimer's inheritance
- The Alzheimer's Association U.S. Study to Protect Brain Health Through Lifestyle Intervention to Reduce Risk (U.S. POINTER) is a two-year clinical trial that will investigate how lifestyle intervention can preserve cognitive function

Shown here are Edward Jones Managing Partner, Penny Pennington (center), with Alzheimer's Association CEO Harry Johns and Chief Science Officer, Maria Carrillo, Ph.D.

The Cost of Alzheimer's Goes Beyond Dollars

Fourteen million – that's the number of Americans projected to be living with Alzheimer's by 2050.

This statistic reinforces the urgency to accelerate research that will advance new treatments – and, ultimately, reveal methods of treatment and prevention. This also magnifies the demand for care and support for all those affected by the disease, including millions of caregivers.

Beyond Alzheimer's emotional toll, the lifetime cost of care is staggering, averaging about \$350,000 per person. Alzheimer's can quickly deplete a family's financial security – destroying relationships and dashing future dreams along the way. This amplifies the significance of early detection, which allows those diagnosed to seek treatment, plan for the future and enroll in clinical trials.

That planning can start with a conversation – conversations like the ones our branch teams initiate every day as we help clients plan for the expected and be prepared for the unexpected. We want families to know they are not alone in this fight.

Edward Jones is committed to providing the Alzheimer's Association with full-mission support. As the number of people affected by Alzheimer's and other dementia continues to grow, Edward Jones' unwavering support of the cause will be crucial to fund research, expand education, advance access to care and broaden awareness of this disease. We are proud to be making a meaningful impact.

For more information about our passion to end Alzheimer's, visit www.edwardjones.com/alz.

Edward Jones is deeply committed to fighting Alzheimer's disease. Here are just a few ways we are providing crucial support.



Awareness

In five years, as National Presenting sponsor of the Walk to End Alzheimer's, we've inspired more than 65,000 participants to walk in more than 600 community-based walks taking place annually.



Research

Our goal is to fund the most effective Alzheimer's research projects, including those at Washington University in St. Louis – and, starting in 2020, the U.S. POINTER study to accelerate the path to treatment, understanding, public dialogue – and a cure, in our lifetime.



Education

To advance early detection, Edward Jones provides its 19,000 financial advisors with an "Alzheimer's Association 10 Warning Signs" online course; they, in turn, co-host community seminars with the Alzheimer's Association to educate clients and caregivers on risk factors and resources when facing long-term illness.



Resources

Thousands of branch teams have shared our dedicated Alzheimer's Association resource, a helpline at 844-440-6600, with clients, colleagues and caregivers. This number connects callers to resources and staff at the Alzheimer's Association 24/7 Helpline, which fielded nearly 250,000 calls in 2019.

Giving clients a voice in D.C.

Championing various causes that clients care about has long been important to us at Edward Jones, even beyond our extensive Alzheimer's advocacy.

For 35 years, Edward Jones financial advisors, branch office administrators and associates from all 50 states have traveled annually to Washington, D.C., as part of our firm's nonpartisan Grassroots Legislative Task Force. We champion the needs of the individual investor, small businesses and causes important or impactful to them.

In 2019, Edward Jones successfully advocated for the SECURE Act to help more Americans save for a secure and dignified retirement.



Study reveals retirement as new beginning

Recent research conducted by Edward Jones and Age Wave shows that retirement is changing and being redefined as a new chapter in life – full of new choices, new freedoms and new challenges across health, family, purpose and finances. Insights from this 9,000-person, five-generation study – nearly 68 million Americans say that COVID-19 has caused them to reconsider their retirement timing – will guide branch teams as they help clients plan for and live well in retirement.

For more information about our passion to support those entering retirement, visit www.edwardjones.com/newretirement.

Advocating for legislation and policies to support the fight to end Alzheimer's

As corporate members of the Alzheimer's Impact Movement, we also advocate annually in Washington, D.C., for policies that will advance Alzheimer's research, care and support.

Our 2019 visit with U.S. Sen. Roy Blunt of Missouri included home office leaders Jesse Hill, Cara Knox and Jeff Panchot.

Strengthening Communities

We're all all-in

Our spirit of volunteerism inspires generous acts of purpose – big and small – every day, like this “Bag-A-Thon” to combat food insecurity in Arizona communities.

Living our values and improving lives by partnering with community organizations has never mattered more.



We've always been community builders

Edward Jones is committed to helping people and places thrive. We partner with organizations to improve the well-being of communities and their citizens, wherever we live and work. And we always have.

Under Ted Jones' leadership, the firm's second managing partner, Edward Jones planted roots in rural America during the last century – and every managing partner since has built upon that legacy of nurturing local communities. We were intent on guiding individual investors and their communities – where our 15,000 U.S. branch offices have since become a familiar sight. And today, we're growing our presence in large metro areas, too.

Wherever you find Edward Jones offices, you'll find associates at work strengthening community in the generous philanthropic spirit of Ted Jones and his wife, Pat.

The Edward Jones Foundation was established nearly 30 years ago to ensure their legacy of caring continues. This independent 501(c)3 organization exists for the benefit of society and is funded by the firm and its leaders, associates and retired partners. It's one of the many ways Edward Jones demonstrates a longstanding commitment to making a positive, meaningful difference in people's lives.



366 organizations benefited in 2019:

- 57%** Health and Social Services
- 13%** Culture and Arts
- 10%** Community, Economic Development
- 10%** Education
- 10%** Other



The legacy of Ted Jones' generosity nurturing local communities that has been built upon by every managing partner since, pictured from left: Doug Hill, Penny Pennington, Jim Weddle and the late John Bachmann.

Helping multiple generations get financially fit

Introduced in 2020, *Financial Fitness* is a comprehensive digital education initiative designed to strengthen the communities we serve.

Featuring technology and a curriculum developed by EverFi, the nation's leading K-12 and adult online learning experts, this portfolio of digital tools and resources is available to high school students, educators, associates, clients and investors. It includes:

In-school education: An in-class course to support teachers and help high school students gain a fundamental understanding of important financial topics, including the markets and financial advising as a career.

Online education: This financial education resource for Edward Jones clients, investors and their families includes dozens of interactive learning modules, providing a solid understanding of the basics of personal finance and investing.

For more information about our passion to strengthen financial resilience, visit www.edwardjones.com/financialfitness.



Our approach to *Financial Fitness*

When knowledge, attitudes and behavior come together, it can drive lasting behavioral change and positive social impact. That's the educational approach of our *Financial Fitness* program's in-school and online components.

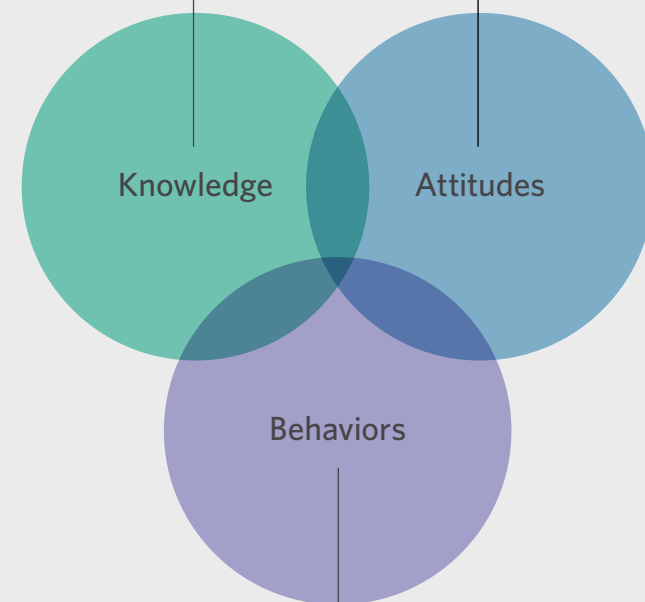
For our high school curriculum, developed in collaboration with educators and aligned to state standards and curriculae, we assess student learning with pre- and post-course surveys – and are seeing measurable gains.

Knowledge gain:
42%

increase in student assessment scores

More confidence:
79%

of students are more confident of achieving goals



Habit change:
78%

of students plan to start investing

SOURCE: Edward Jones *Financial Fitness* Course Student Survey, June 30, 2020

The knowledge gap is showing

Edward Jones' research with Age Wave shows there's too little attention or direction on showing people how to best manage their money and resources during their retirement years, and more than half of retirees (56%) wish they had budgeted more for unexpected expenses in retirement.

That's why the Edward Jones *Financial Fitness* program is so important.

Together with the SIFMA Foundation and EverFi, we help people learn how to make smart financial choices that will benefit them throughout their lifetimes. It's part of our mission to make a meaningful difference in the lives of our clients, colleagues and communities.

Our branch teams see firsthand the confidence that comes from financial knowledge. And we know that when people understand the principles of finance and investing, they are more likely to plan ahead - and achieve higher levels of education, income and career satisfaction. Access to financial knowledge will empower more people to make sound financial decisions at any age.

"By offering an engaging and robust financial curriculum to its clients, high school students, teachers and its communities, Edward Jones is paving the way to a more prosperous future for millions of Americans."

-Tom Davidson, founder and CEO, EverFi



75 schools and 5,000 students

will be reached through *Financial Fitness* in-school curriculum in 2020.



Boosting >100,000 financial IQs:

that's our 2020 goal for the *Financial Fitness* program.

2020 Results (as of Oct. 1):

88,500 clients and unique users

of program content YTD

70,000 total modules

engaged YTD

>14 minutes

average time in program content

>55 high schools

reached

>2,000 high school students

educated

1,500 hours of learning

for high school students



The passion of one inspires many

Many of the community organizations we support are at the request of our associates. And the passions of our people – like those of home office leader Ken Blanchard – often inspire others across the firm.

Years ago, as Ken was donating to a Tempe, Ariz., food bank, he came face to face with food scarcity at a systemic level – and was moved to act. “It was a revelation,” he recalls.

His determination to help has led to increasingly larger “Bag-A-Thon” food drives across the state – including communities where 13% of residents experience chronic food insecurity.

Each year donations have multiplied. And on a single day in November 2019, hundreds of Edward Jones home office associates and branch teams from across greater Phoenix sorted, packed and bagged over 66,000 pounds of food for donation – enough for more than 52,000 meals.



Associates and branch teams donated

66,000 pounds of food and packed 52,000 meals in one day, during our 2019 “Bag-A-Thon” food drive.



We are honored: National recognition

Third-party recognition is valued at Edward Jones because we always are striving to improve our performance. And we know that high industry ratings give our investors confidence, too.

We are proud to have earned J.D. Power’s “Highest in Employee Advisor Satisfaction among Financial Investment Firms” 11 times in a row, more than any of our peers. We also have been honored by FORTUNE magazine for 21 years as one of the “100 Best Companies to Work For®,” and named among the FORTUNE World’s Most Admired Companies from 2018 through 2020.

Whether it’s praise for our investment value, the ethical way we operate or for our empowering and inclusive culture, these are a few of the national awards Edward Jones earned in 2019 and 2020:

Forrester’s Customer Experience Index

FORTUNE 100 Best Companies to Work For®

FORTUNE World’s Most Admired Companies

FORTUNE Best Workplaces for Women

FORTUNE Best Workplaces for Millennials

Human Rights Campaign Foundation’s 2020 Corporate Equality Index

J.D. Power’s Highest in Employee Advisor Satisfaction among Financial Investment Firms

KPMG 2020 Customer Experience Excellence

Money Management Institute/Barron’s Industry Award for Inclusion

Training Magazine Top 125

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Edward Jones received the highest score among employee advisors in the J.D. Power 2007, 2008, 2010, 2012-2015, 2017-2020 U.S. Financial Advisor Satisfaction Studies of employee advisors’ satisfaction among those who are employed by an investment services firm. Visit jdpower.com/awards for more details.

Forrester’s Customer Experience Index (CX Index™) methodology measures how well a brand’s customer experience creates and sustains the loyalty of its customers.

Facing the pandemic

In times of crisis, our purpose becomes paramount. In 2020, as we learned of the COVID-19 global pandemic, Edward Jones took decisive action for the safety and well-being of our communities, clients and each other, following a set of guiding principles we've established for uncertain times like these.

In communities

We offered a coordinated effort to support urgent health, humanitarian and financial needs throughout North America – investing \$2.7 million from the Edward Jones Foundation in a variety of national, regional and community nonprofits in our headquarter cities of St. Louis, Mo.; Tempe, Ariz.; and Mississauga, Canada. Our pandemic relief efforts included donations to the American Red Cross to help ensure a stable blood supply and Foodbanks Canada to help reduce food insecurity in Canada's food bank network.

We also strengthened our decades-long relationships with United Way affiliates by providing additional support for local social services. And our contributions to five hospital systems, the St. Louis Regional Response Fund and local nonprofits helped sustain critical services in a time of increased demands. The pandemic reinforced our commitment to make a meaningful difference in the lives of our clients and society – and every one of us at Edward Jones rose to the challenge.

A collection of associates who gave back to local communities during the pandemic

(top-to-bottom, left-to-right): Region 164 branch teams of Crown Point, Ind., provided 670 meals to Franciscan Health hospital staff; Sr. BOA Becky Ries of Stewartville, Minn., joined others to watch her singer/songwriter husband's Facebook's concerts to continue bringing joy in the face of closed venues; Sr. BOA Maureen Johnson of Lauren, Ariz., joined her husband, Loren, to help support their local Red Cross blood drive and within 24 hours, Bulldog Bags of Solon, Ohio, provided 600 bags of food to children in need with help from the Region 306 branch teams.



For our clients

While branches were closed to in-person traffic, as an essential business, Edward Jones ensured clients' uninterrupted service throughout the pandemic. Branch teams checked in on clients by phone and online, making sure they were healthy and safe. And we kept investors informed on the status of their portfolios with our expanding toolbox of convenient, secure, digital and mobile technology applications.

Compassionate associates amplified our civic and humanitarian efforts within their own communities in a variety of ways – from making thousands of face masks for health-care workers to delivering hundreds of meals and contributing to food drives.

Because of our associates

As coronavirus cases soared, we were guided by our desire to preserve and nurture the Edward Jones experience for all our professionals. We took steps that allowed us to continue serving our clients without laying off or furloughing any of our associates. But many households were still significantly impacted by COVID-19, and some associates needed assistance.

In keeping with our caring culture, 1,800 co-workers and retirees contributed nearly \$1 million for hundreds of fellow associates who requested financial awards through the Edward Jones Disaster Relief Fund.

“United Way is grateful for partners like Edward Jones, whose generosity make it possible for us to connect individuals and families with the critical resources and services addressing their most immediate needs for food, shelter, health care and mental health support.”

– **Michelle Tucker**, *President and CEO, United Way of Greater St. Louis*



Showed support and solidarity for pandemic frontline workers

– including our own – by lighting our St. Louis HQ building blue.

Quarantine cuts for charity

A creative fundraiser ended with financial advisor Nick Ninedorf boasting a “George Costanza” look-alike haircut and more than \$16,000 raised for a local Batavia, Ill., food pantry.



\$1M

Disaster Relief Fund collected nearly \$1M

from associates and retirees for COVID-19 associate assistance.

\$2.7M

Invested \$2.7M in community COVID-19 relief

from the Edward Jones Foundation to local communities, American Red Cross, Canada Food Banks and United Way.

Championing Associates

Raise your hand and be counted

Gathering in celebration, members of the 600-person LGBTQ+ and Allies Business Resource Group (BRG) make up one of 17 BRGs formed to honor associates' unique perspectives – including many affinity groups such as Black/African American, Asian American, Hispanic, Women and adaptABILITIES.



We value and champion our people – more than 49,000 associates, including 19,000 financial advisors

Edward Jones is a place of belonging for all, where our people come together to help clients achieve what matters most. By supporting our associates' personal growth, we are continuously unleashing new possibilities – for them and for our firm. And we are better because of them.

Our associates invest countless hours of their personal time and energy to support worthy organizations and causes, contribute to financially healthy communities and give voice to the interests of clients.

We built ownership into our private partnership business structure. Today, more than 20,000 associates are limited or general partners in the firm.

As a firm, we have prioritized company-wide inclusion, equity and diversity initiatives. Currently, 21% of Edward Jones financial advisors are women and more than 8% are culturally or ethnically diverse. But we have more work to do.

Regions recognized – 36 top workplace awards

We wholeheartedly support and empower associates at all of our locations. Over the past year, our employees have expressed their appreciation from coast to coast, naming Edward Jones as one of the best employers in 36 metro areas and across many states – from New York to California, and Hawaii, too.



Volunteer leadership: 3,000 career mentors

Our partnership culture, married with our business structure, also calls our associates into leadership positions within the home office and our regions. Today, 3,000 home office associates and financial advisors in 300 regions serve as volunteer leaders and mentors to carry on the culture and partnership of the firm for the benefit of all of our clients, colleagues and communities.

Building a truly equitable culture

At Edward Jones, our commitment to inclusion and diversity transcends platitudes and promises. We know that progress depends on the hard work and everyday actions all of us take as we work together toward true equity. It starts with each one of us. And we are prepared to do the work.

1. **We commit to giving everyone a voice** – an experience we started in 2017 through our Courageous Conversations program on race and social justice, which drew thousands of Edward Jones participants. The dialogue has been so impactful, in 2020 we began convening virtual community-based Courageous Conversations to build empathy and common understanding of what must be done to build inclusive economic growth.
2. **We commit to a continued focus on equitable hiring, training, promotional practices and policies**, including a meaningful increase in diversity among financial advisors and senior leadership and a new Inclusion and Diversity annual report.
3. **We commit to equitable pay** and will conduct a rigorous analysis of compensation in our U.S. home offices, sharing results and taking needed actions.
4. **We commit to racial-equity training and anti-racism personnel policies**, expanding our unconscious bias training, adding anti-racism training and introducing Inclusion and Diversity 365 – a program to foster cultural awareness and empathy. The firm does not tolerate racism or discrimination and will continue to take immediate corrective action for any violation of its policies.
5. **We commit to support organizations and efforts that are important to our clients, associates and communities** – including Edward Jones Foundation gifts totaling a \$1 million investment in the National Urban League, which has 90 affiliates in 37 states serving 300 communities, and a \$200,000 contribution to its St. Louis affiliate toward economic empowerment programs, such as Save our Sons, established after the civil strife in Ferguson in 2014.



Serving the underserved

In 2020, as part of our Five-point Commitment to Inclusion and Diversity, Edward Jones expanded its more than four decades of support of the National Urban League (NUL), the nation's largest historic civil rights and urban advocacy organization. The NUL – which promotes economic empowerment through education and job training, housing and community development, workforce development, entrepreneurship, health and quality of life – aligns with the Edward Jones mission to improve lives today and into the future.

“We stand with community builders such as Edward Jones in continuing the important work of defending civil liberties and advancing human rights for all Americans.”

–*Marc H. Morial, President and CEO, National Urban League*

\$1M

Edward Jones Foundation invested \$1 million in National Urban League to **address racism and improve economic empowerment.**

\$200K

\$200,000 in Edward Jones Foundation gifts to St. Louis Urban League will **expand economic programs for people of color and the underserved.**

Purposeful leaders

The desire to be of service is deeply ingrained in each of us at Edward Jones. It springs from the nature of our purposeful work: to improve lives through financial well-being. Each year our collective commitment to making a difference in the lives of our clients, communities and society gains momentum. And so, our impact grows.

Today, many of us are engaged contributors to local civic, community and economic development, serving on 17,000 boards each year.

We are also fulfilled by volunteering with a multitude of community partner organizations, such as Junior Achievement (JA). Recently, JA recognized our contribution of over 5,000 volunteer hours during the 2018-2019 school year with the President's Volunteer Service Award for positive community impact.

Still, we want to do more. It is in times of crisis that our community partners do their best work. It is also when they need us most. We are faced with an even greater opportunity to lead with purpose. In response, we introduced a new digital platform, or social impact tool, to make it easier to give to those in need.



17,800 hours of service pledged by home office associates

during 2019 United Way annual campaign to help others.



United in nearly a century of support

Once again, the firm demonstrated its strong spirit of caring and working in partnership for others through the annual 2019 United Way campaign. Over \$8 million was collectively raised through campaigns in St. Louis, Tempe, and Mississauga - including contributions from the Edward Jones Foundation to exceed our highest total. Edward Jones has been supporting the United Way mission for nearly a century to provide the immediate and essential needs of food, shelter and health care to children, families and seniors in our own communities.

Protecting Our Planet

Fisheries, wildlife and soil, oh my

Gathered for their 2019 Summer Regional Meeting, Region 249 financial advisors of Ontario, Canada, and their families learn about environmental conservation at Prairie Fork Conservation Area.

Donated to the Missouri Department of Conservation by Pat Jones in 1997, the 711-acre farm in Williamsburg, Mo., hosts educational programs throughout the year focused on natural resources, restoration, management and research.



The legacy of Edward Jones is rooted in conservation and philanthropy – and an abiding respect for nature, thanks to Ted and Pat Jones.

Their personal investment of \$2.2 million in 1990 to convert the abandoned Missouri-Kansas-Texas Railroad (MKT or Katy) corridor into the longest recreational trail in the country created Missouri's Katy Trail State Park.

Thirty years later, this truly trail-blazing feat continues inspiring us to protect nature.

From our work to develop carbon footprint metrics to green building and sustainable best practices at our home office campuses in the U.S. and Canada, Edward Jones is working to safeguard our associates, reduce waste and protect and restore natural habitats.

We are also extending our environmental stewardship by tracking key environmental and energy metrics throughout our business operations. To that end, we encourage our associates to think like owners, make sustainable decisions for the long term and reduce their environmental footprint – at home, at work and in their travels.

“As long as you are on this earth, it’s your responsibility to make it better for those who come after you.”

– *Pat Jones (1925-2018), Conservationist and Advocate*



Managing Partner Penny Pennington on a patch of Katy Trail in St. Charles County, Mo., clocking in her healthy activity for the day as part of the American Cancer Society’s CEO Challenge to raise awareness and funds for cancer research.



Reducing our impact

Holistic, long-range planning comes naturally to us at Edward Jones – after all, we’re in the business of helping ensure healthy financial futures. We believe developing and implementing sustainability goals requires a similarly broad but well-defined approach that considers the triple bottom line: people, profit and planet.

Expanding our digital toolbox – and growing greener all the time

Today, as more of us turn to digital platforms to manage our lives, Edward Jones is investing \$500 million to accelerate its digital strategy. Our digital innovations will include learning tools and questionnaires, interactive financial snapshots for clients and convenient mobile apps, allowing us to securely share and store important investment information, provide personalized financial tips and communicate with clients in the life moments that matter.

We are committed to understanding our clients’ needs and building technology solutions in collaboration with them to deliver on their evolving expectations. As the needs of our clients become more complex, we are on a journey to provide value beyond financial performance, delivering complete wealth management and helping clients feel informed, understood, secure and in-control – on their terms.

By increasing our use of digital technologies, we’ve reduced our paper consumption significantly – helping to reduce our environmental impact.

Our environmental sustainability mission

Edward Jones has an expansive real estate footprint. In our U.S. home offices alone, associates occupy about 2.4 million square feet of office space.

As a consumer of natural resources and a concerned corporate citizen, we are making significant 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.

Today we are cultivating a culture of environmental sustainability using six core strategies.

The firm has been evaluating strategies to inform a more holistic alignment for years across 6 core areas of focus:



recycling waste



landfill waste



compost waste



culture & community



health & well-being



carbon footprint

Aiming high

The Sustainability Development Goals are a blueprint from the United Nations to address global challenges to a sustainable future – including poverty, inequality, environmental degradation, peace and justice.

With these vital goals in mind, smaller forums and working groups have been evaluating strategies to inform a more holistic alignment for years. In 2021, the firm looks to define, prioritize and determine the best ways we can make the biggest difference wherever we live and learn, work and play.



Pat and Ted Jones – depicted at their farm, now the Prairie Fork Conservation Area – liked to count everything from trees, flowers and quail to financial advisors and the people they served. Therefore, it seemed fitting for Missouri artist Bryan Haynes to create this mural for Edward Jones, mounted in the atrium of its St. Louis headquarters, using the Fibonacci sequence of numbers to reflect and emulate the beauty of nature.

Edward Jones®

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

To learn more about our work to help end Alzheimer's, visit www.edwardjones.com/alz.

To learn about our Financial Fitness program, visit www.edwardjones.com/financialfitness.

And to learn more about Edward Jones' purposeful citizenship efforts, please visit: www.edwardjones.com/PurposeMeetsPassion.

To learn more about our Retirement Study, visit www.edwardjones.com/newretirement.

To learn more about Edward Jones employment, visit www.careers.edwardjones.com.



Compassion is a two-way street

Financial advisor Kat Rock, of Stuart, Fla., shares a moment with her longtime client – one of many Edward Jones clients who reached out to wish our branch teams well during the pandemic.