

# Overview of Edward Jones

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## History

- Founded in 1922 by Edward D. Jones Sr.
- Canadian Headquarters in Mississauga, Ontario
- First Canadian branch opened in 1994 located in Nepean, Ontario
- U.S. Headquarters in St. Louis, Missouri



Edward Jones is a limited partnership in Ontario, Canada, and is a wholly owned subsidiary of Edward D. Jones & Co., L.P., a Missouri limited partnership ("Jones US"). Jones US and its parent do not guarantee the obligations or liabilities of Edward Jones.

# Overview of Edward Jones

## Edward Jones today

### North American presence

#### Headquarters

- Mississauga, Ontario, Canada
- St. Louis, Missouri, USA

#### Firm

- An associate-owned private partnership with more than 50,000 associates

#### Branches

- More than 15,000 branch offices across the United States and through the firm's affiliate in Canada

#### Clients

- More than 7 million investors
- \$1.8 trillion in assets under management

Data as of November 2021



## Edward Jones today

### Canadian presence

#### Headquarters

- Mississauga, Ontario, Canada

#### Firm

- An associate-owned private partnership with more than 1,800 associates

#### Branches

- More than 650 branch offices and more than 850 advisors across Canada

#### Clients

- More than 240,000 clients

Data as of January 2020



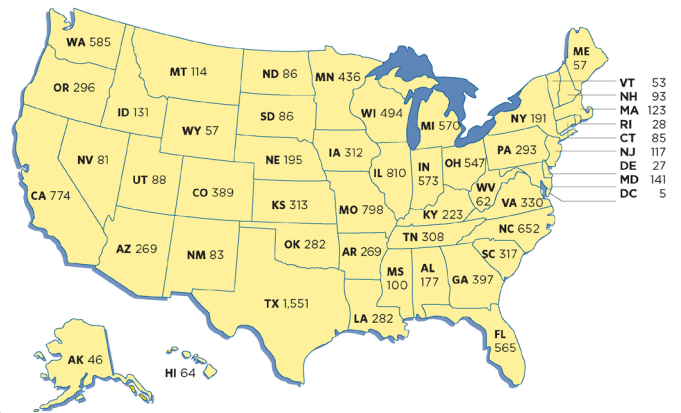
# Overview of Edward Jones

## Where we are Canada branch offices



As of November 2021

## Where we are United States branch offices



As of November 2021

# Overview of Edward Jones

## Recognition



### Wealth Professional, 5 Star Brokerage Award

Edward Jones Canada received the highest-ranking brokerage award in the 2022 Annual Wealth Management Advisors Survey. This award recognizes Edward Jones' commitment to corporate culture and ethics, training and support, compliance and regulation, and compensation. As one of the largest brokerage partnerships in North America, Edward Jones fosters a culture that embraces diversity, and creates opportunities for employees to leverage their strengths and growth mindset.



### KINCENTRIC, 2022 Best Employers in Canada

For the 21st consecutive year, Edward Jones placed in the top 25% for employee engagement in 2022 List of Best Employers in Canada published in the Financial Post.

## What makes us unique

- Commitment to serious, long-term investors
- Financial advisor offices in convenient locations
- Face-to-face relationships
- Partnership structure



# Overview of Edward Jones

## Our purpose

To provide solutions that help individuals pursue their serious, long-term financial objectives, including:

- Preparing for retirement
- Living in retirement
- Paying for education
- Preparing for the unexpected
- Planning your estate or inheritance



## Getting started

- I want to understand what's important to you
- We'll use an established process to build personalized strategies to help you achieve your goals
- We will partner together throughout your life to help keep you on track





# Overview of Edward Jones

## Investment philosophy

- Buy quality
- Invest for the long term
- Diversify



Diversification does not guarantee a profit or protect against loss.

## Investments & Protection

### Investments

- Annuities
- Equity Investments
- Fixed-income Investments
- Guaranteed Investment Certificates (GIC)
- Investment Programs
- Edward Jones Guided Portfolios®
- Edward Jones Portfolio Program®
- Mutual Funds
- Treasury Bills

### Protection

- Critical Illness Insurance
- Disability Insurance
- Long-term Care Insurance
- Permanent Life Insurance
- Universal Life
- Whole Life
- Term Life Insurance



Insurance and annuities are offered by Edward Jones Insurance Agency (except in Quebec, in Quebec, insurance and annuities are offered by Edward Jones Insurance Agency (Quebec) Inc. Edward Jones Guided Portfolios® is the Edward Jones® Private member's applicable Edward Jones Guided Portfolios Agreement for more information. Many other investments or Guided Portfolios are offered by prospectus. You should consider the investment objectives, risks, and charges and expenses carefully before investing. The prospectus contains this and other important information. Where applicable, you'll find Edward Jones and/or its products, services, and/or programs, which you should read carefully before investing.

The Edward Jones Portfolio Program® is a comprehensive managed-investment program that combines personal investment strategy driven by the advisor and professional portfolio management driven by a global asset manager LLC.

# Overview of Edward Jones

## Services

- Cash Management Services
  - Edward Jones Personal Line of Credit<sup>1</sup>
  - Edward Jones Premium Interest Account (PIA)
  - Mortgage Referral Service<sup>2</sup>
- Client Consultation Team
- Company Retirement Plans
- Equity Research
- Financial Calculators
- In-trust Accounts
- Individual Plans
- Insurance Specialists
- Investor Education Programs
- Online Access
- Portfolio and Retirement Plan Reviews
- Pre-Authorized Chequing Plans (PACs)
- Registered Disability Savings Plans (RDSPs)
- Registered Education Savings Plans (RESPs)
- Systematic Investing

Edward Jones, its employees and financial advisors are not estate planners and cannot provide tax or legal advice. Please consult a qualified tax specialist or lawyer for professional advice regarding your specific situation.

1 Your personal Line of Credit is a margin account. Borrowing against securities involves greater risks than using cash resources only and is not appropriate for everyone. Your responsibility to repay the loan and interest continues, even if the value of the securities declines. If the value of your securities declines, you may be required to deposit funds, additional securities, or sell the securities in your account to meet the margin call. Interest begins to accrue from the date funds are borrowed and is charged to the account. Rates are subject to change without notice. Available only for certain account types and subject to approval.

2 Mortgages are offered through Manulife Bank of Canada and Manulife Trust Company.

Systematic Investing does not guarantee a profit or protect against loss.



## A team approach

### Key members of your team

1. **Your Edward Jones branch team**
  - Financial Advisor
  - Branch Office Administrator
2. **Your Edward Jones home office team**
  - Research Strategists and Analysts
  - Client Consultation Group
  - Senior Insurance Specialist Team
3. **Your legal and tax professionals**

### In addition, you can expect:

- Clarity
- Guidance and Leadership
- Confidence

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