



Deeply invested

2021 Purpose, Inclusion and Citizenship Report



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Penny Pennington

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inclusion (DEI) journey

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Our purpose:

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



At a glance

Approximately
\$25.7 million
contributed in 2020 through
corporate, Foundation and
associate philanthropic support
to 254 unique organizations.

\$50 million raised
and an estimated
150,000 walkers
10-year impact of Edward Jones'
Alzheimer's Association strategic
alliance by the end of 2025.

More than
**250 Courageous
Conversations**
around diversity, equity and
inclusion with approximately 12,000
participants since June 2020.


**>14,000 community
organizations**
served by nearly 10,000 associates
in 2020-2021.

68%
of corporate, Foundation
and associate
\$25.7 million
philanthropic support in 2020
was for health and social services.

Goal of **>300,000**
individuals and 20,000 high school
students we aim to help provide
20,000 hours of financial education
in 2021 to become more financially
knowledgeable, confident and resilient.

With one in 10 Americans over
65 suffering from Alzheimer's,
an estimated
300,000
Edward Jones clients could be
suffering from Alzheimer's - and
nearly triple that number are estimated
to be serving as unpaid caregivers.

We're striving to achieve
**diverse representation
goals by 2025**
including 20% people of color and
continued gender parity among
leaders in the firm's U.S. and Canada
home offices and 15% people of
color and 30% women among
U.S. and Canadian financial advisors.


Diversity, equity and inclusion (DEI)
April 21, 2021, Day of Reflection
**resources accessed
over 20,000 times**
by associates.

\$150 million
in anticipated corporate,
Foundation and associate
philanthropic contributions
by 2025, including \$80 million
for revitalization, economic
inclusion and philanthropy
in St. Louis.


>\$600,000
distributed in 2020 to associates
from associates' and retirees'
contributions for disaster relief.

Approximately **one million**
adults and youth building economic
inclusion and financial health by
2025 through Edward Jones' Financial
Fitness program.

A letter from Penny Pennington

Welcome!

I'd like to thank you for taking the time to learn more about our firm and the work we do to bring our purpose to life to improve the lives of our clients and colleagues, and together, better our communities and society.

Our business is to partner with 7 million (and counting!) clients and their families to help them achieve what is most important to them. In that partnership, and with our 50,000 colleagues and thousands of communities across North America, we invest our time, treasure and talent to positively influence society, become more environmentally responsible and support good causes.

If it sounds ambitious, it's because it is. But we believe there is power in purpose and in working together to make our world a better place. We believe in the power of human relationships – relationships that are based on serving the needs of others.

In 2020, the people of Edward Jones demonstrated how much good can be done when we come together to be a **positive influence on society**. We get up every day to help our clients and their families achieve what's most important to them. We want to create more value for them, innovate and be a magnet for talented colleagues. That's why we made a five-point commitment to build a place of belonging for our associates and create opportunities for people of color. We're also working in partnership with the Alzheimer's Association to end Alzheimer's disease, which afflicts one in 10 Americans age 65 or older – or an estimated 300,000 Edward Jones clients – and affects millions more. On another front, our Financial Fitness program, which we established in 2020, is helping to build financial health and economic inclusion with the goal of reaching over one million Americans by 2025.

Our strong sense of purpose and long heritage in conservation drives us to become even more **environmentally responsible**. We know that the decisions we make can work in service to our planet just as for our clients and colleagues.

Edward Jones continues to **support good causes** in so many ways. We extend our purpose and impact by partnering with hundreds of nonprofit organizations – and by working with them, we unleash extraordinary human potential and inspire future generations. In 2020 alone, our corporate, Foundation and associate philanthropic contributions totaled \$25.7 million. We also help each other recover with resilience when the unexpected strikes. Through our Edward Jones Disaster Relief Fund, over \$600,000 was distributed in 2020 from associates' and retirees' contributions for disaster relief to associates who were struck by federally declared disasters such as COVID-19, hurricanes, severe storms and wildfires.

Our colleagues demonstrate time and again that when we bring together our collective resources, reach and resolve, we create amazing opportunities for individuals, families and communities.



Our Edward Jones family has been in service to others for nearly 100 years. Our aim is to continue partnering in our business, and in every community where we live and work, to live out our purpose to improve lives and help communities thrive.

Thank you for taking the time to learn more.

A handwritten signature in black ink, appearing to read "Penny Pennington".

Penny Pennington,
Managing Partner, Edward Jones

About this report

Edward Jones, a Fortune 500 company headquartered in St. Louis, provides financial services in the U.S. and, through its affiliate, in Canada. Every aspect of the firm's business, from the investments its financial advisors offer to the location of branch offices, caters to individual investors. As of June 25, 2021, the firm's 18,855 financial advisors served more than seven million clients with a total of \$1.7 trillion in assets under care. Visit edwardjones.com or the recruiting website at careers.edwardjones.com. Member SIPC.

This Purpose, Inclusion and Citizenship Report highlights the work Edward Jones did during calendar year 2020 to bring our purpose to life. It is our third such report and reflects the achievements of our more than 50,000 associates throughout North America as we collectively pursue our purpose, which is to partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society.

"The support we receive from Edward Jones is extraordinary. Their funding continues to enhance the Alzheimer's Association's® care and support programs, broadens awareness of this disease and helps accelerate critical research. Edward Jones has made the largest commitment ever pledged to our organization by a corporate partner, and we are honored and deeply appreciative that its associates, clients, families and friends share the Association's vision of a world without Alzheimer's and all other dementia."

Harry Johns,
President and CEO, Alzheimer's Association



This Purpose,
Inclusion and
Citizenship Report
highlights the work
Edward Jones did
during calendar year
2020 to bring our
purpose to life.

We are a force for good in society.

Positive change starts from within our 50,000 colleagues across North America. That's why we are working to create a place of belonging for all where our associates can thrive. Progress through our five-point commitment, diverse representation goals and results from our pay equity analysis are part of the important work to foster diversity, equity and inclusion at Edward Jones.

2020 showed us just how much good can be done when we **partner together** to accomplish significant things.

As a force for good, by the end of 2025, Edward Jones is aspiring to:

- **Achieve U.S. and Canada diverse representation goals**
by 2025: 20% people of color and gender parity among leaders in the firm's U.S. and Canada home offices, 15% people of color and 40% women among U.S. and Canadian home office general partners and 15% people of color and 30% women among U.S. and Canadian financial advisors
- **Raise \$50 million over 10 years**, the largest ever corporate commitment to support the Alzheimer's Association mission to end Alzheimer's disease
- **Educate an estimated one million adults and youth** building economic inclusion and financial health by 2025 through the Edward Jones Financial Fitness program

Making a positive influence on society starts within our own walls by committing to strong diversity, equity and inclusion practices that aim to end inequities; reflect the communities we serve and ensure we have a diverse workforce that meets the needs of current and future clients; making the largest corporate commitment ever to support the Alzheimer's Association's mission in ending Alzheimer's disease; and empowering high school students and younger investors to become more knowledgeable, confident and financially resilient. Through it all, we are united as one, partnering with our clients, colleagues and communities to exponentially increase our impact.



Our **diversity, equity and inclusion (DEI)** journey

2020 was a year none of us will ever forget. We faced the worst pandemic since the 1920s and the largest racial equity reckoning in decades. The world in 2019 looked and felt different than where we stand now, in 2021. How we partner for positive impact on society must evolve as well – especially in light of our collective experience the past 18 months. That's why one of our top priorities is creating a place of belonging where our colleagues can thrive.

We're not starting from scratch. With Marion Dickey becoming our first woman financial advisor in 1974, we have been making progress toward becoming a more diverse and equitable firm. Our formal DEI efforts began in 2007, followed by the launch of our first Business Resource Group (BRG), our Black/African American BRG, in 2009. Former managing partner Jim Weddle was one of the first 150 CEOs to sign the CEO Action Pledge in 2017 to act on supporting more inclusive workplaces, and Penny Pennington has continued that legacy by signing it on her first day as managing partner.

But we know that what we've done so far hasn't gotten us where we want to be, as an industry or as a firm. Research shows that diversity of thought, perspective and leadership drive the most innovative outcomes for businesses and their clients, colleagues and communities; we know that our home office general partners, some of our firm's most senior U.S. and Canadian leaders, are currently 9% people of color and 30% women – in line with the broader business community but out of step with the talent that exists around us. We want to lead the way to a more equitable future, which is why earlier in 2021, we committed to improve diverse representation not just at our senior leadership level, but across leadership in the firm's home offices and our overall financial advisors by 2025.

This commitment doesn't stop with the numbers. We're evaluating our internal systems and processes for unintentional bias and driving accountability around not just the *what* of what we do but *how* we get there. We're also sharing the outcomes of those evaluations in ways that we haven't in the past, helping illuminate the real challenges so that our talented colleagues can innovate new solutions. Speaking of innovation – we've doubled the size of our diversity, equity and inclusion team, with a dedicated innovation arm and allocated full-time resources to DEI efforts across other functional areas. We've embedded DEI practices into the fabric of how we solve problems and deliver for our clients. It's taking shape across our organization in hundreds of ways, and we want to highlight some of our strongest efforts over the last year.



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Belonging: What does it mean and why is it important?

One of the most fundamental of all human needs is to belong. And yet, according to *Harvard Business Review* and BetterUp, 40% of people say they feel isolated at work. How is something so necessary so hard to come by? When we aren't able to provide a place of belonging for all, the consequences are high: lower associate engagement, slower productivity and increases in turnover.

Seeking to strengthen our culture and create a place of belonging for all, in 2020, the diversity, equity and inclusion (DEI) team hosted a Day of Reflection panel for associates, "Belonging: What Does It Mean and Why Is it Important?" in which *New York Times* best-selling author **Ori Brafman** summarized a year of unprecedented change, brought about by social unrest, a global health pandemic, market uncertainty and a presidential election. He described how these events have furthered feelings of exclusion, causing associates, family members and clients to feel isolated and alone.

Ori facilitated a discussion with financial advisors and home office leaders, who shared their experiences of belonging at work, exclusion experiences and learnings and suggestions for being accepted and included at work. This created an opportunity to listen, learn and foster a culture where we belong and can bring our true authentic selves to work.



Ori Brafman

"The work we do to assist African Americans and others throughout the region to secure economic self-reliance, social equality and civil rights would not be possible without a purposeful firm like Edward Jones standing right alongside us. From ensuring job training through the Save Our Sons program and co-creating a financial empowerment program, we're grateful for what Edward Jones helps us accomplish year after year to restore dignity and build generational wealth."

Michael McMillan,
President and CEO, Urban League
of Metropolitan St. Louis



Our commitment to diversity, equity and inclusion

In June 2020, we bolstered our promise to diversity, equity and inclusion by making a commitment to build a place of belonging for all associates and positively impact opportunities for people of color. In June 2021, we announced our progress to expand diversity, equity and inclusion at every level.

We're advancing our **five-point commitment** to expand diversity, equity and inclusion at every level

1. Giving everyone a **voice**

As one of the first signatories of the CEO Action for Diversity pledge, which aims to rally the business community to advance diversity and inclusion within workplaces, Edward Jones committed to engage colleagues in honest dialogue as a tool to create change. To date, the firm has hosted hundreds of sessions for our colleagues on topics ranging from deepening the conversation on race to Hispanic heritage and disability awareness issues. As the world evolves around us, we're sure to rapidly create these spaces for conversation on some of the most challenging items in the news, allowing our associates the time and companionship they need from their colleagues in challenging moments. The impact of the world around us does not stop when we step into our offices or turn on our Zoom, as the last year in particular has shown us, and we strive to recognize that and create intentional spaces for learning, unlearning, healing and growing.

Since June 2020, more than 250 Courageous Conversations reached approximately 12,000 participants who shared their perspectives, heard from those around them, built understanding and strengthened empathy. Edward Jones has taken these conversations into the business community as well, partnering with the American City Business Journals to host Community Courageous Conversations in Kansas City, Raleigh-Durham and St. Louis in 2021.

More than

250 Courageous Conversations

around diversity, equity and inclusion with approximately

12,000 participants since June 2020.



"While these conversations are happening in our workplaces and communities year-round, this is a collective moment for us as human beings to be intentional and deliberate in how we support one another. Through listening, learning and reflection, we challenge ourselves to build a more diverse, equitable and inclusive society – one where everyone is able to be their authentic selves and has access to the same opportunities. Every Courageous Conversation I have participated in has had a lifelong impact on me."

Kristin Johnson,
Chief Human Resources Officer
and Chief Transformation Officer

2. Equitable hiring, training, promotional practices and policies – **diverse representation by 2025**

Through tailored programs, mentorship and dedicated support that meets colleagues where they are, Edward Jones will help each of our associates succeed. To achieve our goals, we are holding leaders accountable to hiring and developing their teams, sharing best practices such as how to assemble diverse candidate slates, equipping leaders with data-informed insights about their area's specific hiring and retention opportunities, and evolving our mentorship/sponsorship program to help associates grow and build their careers.

The challenges of the triple pandemic (social unrest, COVID-19 and market uncertainty) accelerated the need for Edward Jones to seek new ways to support our financial advisors to grow their practices. Our **ReLaunch Your Career** program delivered hyperpersonalized, tailored support to help financial advisors serve their clients in deeper ways while meeting performance expectations. Participants saw higher performance improvement and lower attrition rates than non-program participants, and the learnings are now being embedded across our performance support system.



As of June 2021, 8% of our firm's U.S. and Canadian financial advisors were people of color and 21% were women. Within our U.S. and Canada home offices' senior leadership roles, 9% were people of color and 30% were women.

We are deeply committed to equitable hiring, training, promotional practices and policies and are actively driving to meet our diverse representation aspirations. These are not just hiring goals; we aim to retain diverse talent as well. In the U.S. and Canada, we're striving to achieve the following by the end of 2025:

15%

people of color and

30%

women among U.S. and Canadian financial advisors.

15%

people of color and

40%

women among U.S. and Canadian home office general partners.

20%

people of color and

gender parity

among leaders in the firm's U.S. and Canada headquarters.



3. Conducting an analysis of pay

We are committed to equal pay for equal work for our associates. In 2020, we analyzed pay for our U.S. home offices to assess equal pay for equal work across race and ethnicity, gender and gender identity, sexual orientation and military status.

The results of that analysis were encouraging with less than 2% of associates identified as having any kind of gap in pay for work equal to their peers. These identified gaps have been addressed to ensure equal pay for equal work.

Most importantly, our analysis concluded that we employ best practices to ensure that pay decisions are not impacted by bias based on race and ethnicity, gender and gender identity, sexual orientation or military status. Best practices and tools we use to ensure equal pay include routinely benchmarking roles against market comparables, providing transparency of pay grade ranges to our applicants and associates, setting pay ranges for all roles based on skills and experience, and consistent processes for annual merit increases and bonuses.

We will continue to conduct regular pay equity studies to drive ongoing improvements and maintain equity.

4. Racial-equity training and anti-racism personnel policies – a best place to work for all

Though we've been on the Fortune 100 Best Companies list for 22 years, we continue to challenge ourselves to innovate. In 2020, we enhanced our more than decade-long Inclusion and Diversity Week program to become Inclusion and Diversity 365 (I&D 365), a dedicated strategy providing yearlong learning opportunities, programs and experiences that foster cultural awareness and empathy for all associates and leaders. Hosted in collaboration with our Business Resource Groups (BRGs), I&D 365 highlights a specific dimension of diversity each month (e.g., Pride, Women's History, Native American/Indigenous Peoples, Disability Awareness Month) and provides educational opportunities, panels featuring internal and external speakers, tailored Courageous Conversations and dedicated space for our associates to share experiences that have shaped who they are today.

We've also used 2021 to revitalize our approach to diversity, equity and inclusion (DEI) learning by introducing new interactive courses on foundational DEI concepts like the difference between equity and equality, the sometimes valuable – and sometimes negative impact of – unconscious bias and the importance of active allyship. Nearly three-fourths of our general partners have taken the DEI Foundations course so far.

Though we've been on the Fortune 100 Best Companies list for 22 years, we continue to challenge ourselves to innovate.

5. Supporting organizations and programs important to our clients, colleagues and communities – **investing in people, offering jobs and opportunity for all**

Our dedication to diversity, equity and inclusion doesn't stop at our doorsteps or the edges of our screens. We believe our firm has a responsibility to work in partnership with stakeholders to nurture our communities and provide greater opportunity for high-need individuals. In 2020, we committed \$1.2 million to continue fostering our 40-year partnership with the National Urban League and Urban League of Metropolitan St. Louis, advancing their mission to create self-reliance, social equality and civil rights. In addition, we also expanded our partnership with Everfi to offer financial education, with the goal of reaching 20,000 high school students, in at least 50% high-need city schools, in 2021. By 2025, we hope to educate over one million adults and youth, driving economic inclusion and possibility in the communities we serve.



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Diversity, equity and inclusion (DEI): Progress on multiple fronts

Here are some other highlights from the progress we've made:

Day of reflection and understanding

Inspired by our CEO Action pledge and established in December 2020, Edward Jones hosts one day each year dedicated to sharing, thinking and learning about what we can do to strengthen our unity and our place of belonging. On April 21, 2021, associates accessed group and individual activities and other resources more than 20,000 times. These included podcasts, *Share My Story* videos featuring our own associates, panels, reflection tools and learning journeys centered on empathy, bias, allyship, resilience, inclusive leadership and race awareness.

"I was emotional coming off the Derek Chauvin verdict. After watching a *Share My Story* video, I was brought back to what matters most: my relationships ... with my team, family, region, friends and clients. ... I love this firm and all we stand for."

Regional Leader Laurelyn Pohlmeier,
Corpus Christi, Texas

DEI collaborative

Also launched in December 2020, Edward Jones formed an advisory group of diverse financial advisors, branch office administrators (BOAs) and home office associates to offer perspective and input as we advance firmwide DEI strategies. Current efforts include how we evolve our Business Resource Groups (BRGs), mentorship program, field DEI roles and financial advisor-driven DEI events.

"I'm excited to be a part of this important work and look forward to what we will accomplish together. I'm looking forward to collaborating and developing strategies that will significantly move the needle for our firm in the DEI space."

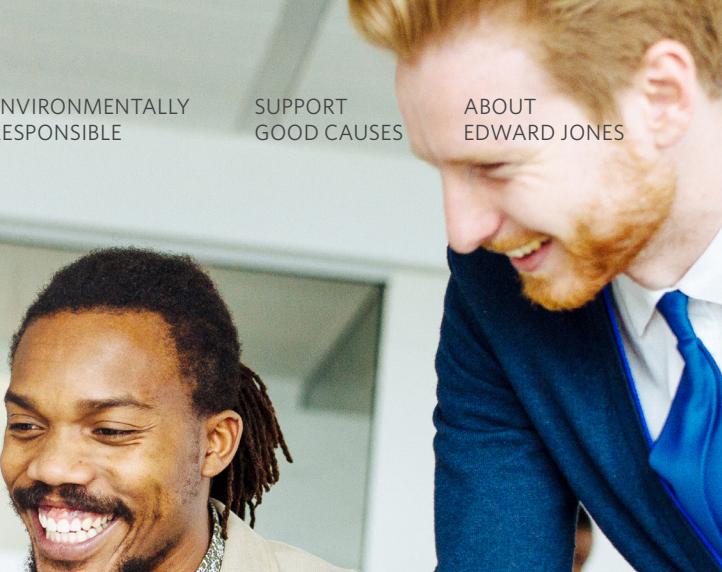
Regional Leader and Financial Advisor Anson Sobers, Dallas, Texas

Edward Jones digital library

A newly curated collection of e-books and audiobooks, launched April 2021, is now available to provide associates 24/7 access to digital DEI resources. With more than 2,000 "checkouts" during the first three months, 95% of the DEI titles have been read since launch. Topics such as DEI, leadership, continuous learning and wellness support associates seeking to self-educate and better understand our clients, communities and one another.

"What an incredible resource for development! The ability to access these books (and specifically the audiobooks) from any device allows me to dive into this knowledge at any time."

Financial Advisor Paul Sweeney II, Steubenville, Ohio



Evolving our **business** resource groups

In 2021, we are evolving our Business Resource Groups (BRGs) to include not only home office associates but also our financial advisors and branch office administrators – following the successful firmwide expansion of our LGBT & Allies BRG. Additionally, we are launching an Interfaith BRG and exploring other BRG additions to cultivate deeper relationships, develop talent, generate referrals and strengthen our culture.

Our work here is not new, but it's far from over. Throughout 2020 and so far in 2021, we've built a stronger foundation on which we can accelerate our progress and increase our positive impact. There's much more to come. In addition to all that we've outlined so far, we're taking a hard look at everything from how we evaluate talent and make succession decisions to the competencies and behaviors we expect of our leaders. We're building new approaches to disability support and expanding our mentorship program into a true sponsorship initiative. We certainly don't have all of the answers, but we are deeply committed to making progress – and to sharing where and how we're succeeding with all of you.

Self ID

In support of our broader diversity, equity and inclusion (DEI) goals, we're adding expanded voluntary Self ID options – like disability status – to more completely capture the many facets of diversity that our associates represent. With this information in hand, we'll better understand how to continue evolving our DEI support, our representation goals and development objectives, and our full suite of talent initiatives.



Share My Story

Everyone has a story, and at Edward Jones, we've collected 50 and counting to make available via the *Share My Story* series. These brief personal stories are offered to build empathy and understanding of our colleagues and their lived experiences and backgrounds.

For example, **Ruqiyya Yasin of Operations and Service Training** shares her story as an African American and Muslim woman who chose to start wearing her hijab at work after years of not doing so. "I had a chance to ... talk about my journey and how it feels to become your authentic self. I've had coworkers and others across the firm send me messages saying how courageous that was and how I set a platform for them to become courageous. I'm hoping I'm able to make a change in other people's lives to become authentic."



Care and support for our associates' **physical and emotional well-being**

Year after year, we further cement our status as a top place to work for our associates, and its reflected by the accolades we receive. But those accolades don't tell the whole story about the depths of compassion we have for our associates. Creating a place of belonging starts with our leadership within both the home office and the field. When Managing Partner Penny Pennington released what would be the first of many communications in the early days of COVID-19, she began with a steady assurance: "We are built for times like these."

Helping our associates make a positive impact in the lives of our clients, colleagues and communities starts with the care and support we provide to our associates as we address their physical, nutritional, emotional, financial and social well-being.



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

- Expanded parental leave policy
- Comprehensive wellness program, including:
 - Physical activity resources and challenges
 - Mental health resources for associates and family members
 - Online fitness and yoga sources
 - Nutritional resources and challenges
 - Incentives for healthy lifestyle choices
- 10 additional days of coronavirus-related paid time off
- Expanded well-being support resources as a result of the pandemic
 - Employee Assistance Program visits
 - Suite of courses and audio sessions on topics supporting emotional well-being
 - Increased ability to work from home
 - Expanded access to virtual medical visits
- Online tutoring program available to associates and their families
- 401(k) and HSA match (eligible BOAs and home office associates only)
- Profit sharing (eligible financial advisors, BOAs and home office associates only)
- Financial education resources for associates and their families
- Flexible work policy

We recognize how important it is for our associates to feel supported and cared for so they can do the same for our clients. One level of that support involves continuously improving options in the U.S. so that associates can comfortably and voluntarily self-identify their disabilities. Additionally, we've built a team dedicated to designing digital experiences that are accessible for all clients and colleagues.

Ending Alzheimer's

In 2016, Edward Jones became the first 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 75,000 participants have walked under the Edward Jones banner to help raise more than \$25 million in the fight to end Alzheimer's disease. In July 2020, we announced the renewal of our five-year strategic alliance, for a total commitment of \$50 million by the end of 2025, the largest ever corporate commitment to the Alzheimer's Association to date. 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.

A greater threat than COVID-19, cancer, heart attack and stroke, Alzheimer's disease is the most feared health condition of later life by U.S. retirees, according to a recent Edward Jones and Age Wave survey. We prioritized Alzheimer's as our first national community partnership for a multitude of reasons (see below) and pledge our 10-year commitment with the Alzheimer's Association will reach \$50 million with an estimated 150,000 walkers by 2025.

In 2020:

- It's estimated that about 300,000 Edward Jones clients have Alzheimer's – based on this disease afflicting one in 10 Americans age 65 and up – and nearly triple that number are serving as unpaid caregivers.
- Alzheimer's is one of the costliest diseases. In fact, a lifetime cost of care can total more than \$350,000.
- More than six million Americans are living with Alzheimer's, which too often robs families of their relationships and their wealth – two things we work so hard to preserve.
- Since 2006, Alzheimer's has been the sixth-leading cause of death in the U.S.

Source: 2020 Alzheimer's Disease Facts and Figures Report.



300,000

estimated number of Edward Jones clients suffering from Alzheimer's – one in 10 Americans age 65 and up – and nearly triple that number are serving as unpaid caregivers.

\$350,000

estimated lifetime cost of Alzheimer's disease.

\$50 million raised and an estimated 150,000 walkers

10-year impact of Edward Jones' Alzheimer's Association strategic alliance by 2025.

>6 million

estimated Americans living with Alzheimer's, which too often robs families of their relationships and their wealth – two things we work so hard to preserve.

#6

Alzheimer's rank among leading causes of death in the U.S.





Why we walk

For **Financial Advisor Darron Kidwell of Knoxville, Tenn.**, it all started innocently enough shortly after joining Edward Jones in 2014. The firm announced that it would be the first National Presenting Sponsor for the Alzheimer's Association Walk to End Alzheimer's. He attended his first Walk to honor several clients who were facing this disease, and it was great to see how many folks in our community supported the event but heartbreaking to hear the stories of the families affected.

Fast-forward six months, he received a call from his sister speculating something was going on with their dad. One day during his daily drive to his granddaughter's school, he suddenly stopped in the middle of the road. A doctor's visit shortly thereafter confirmed a diagnosis of Alzheimer's and inspired a flood of questions. Darron was able to reach for answers and support from the same Alzheimer's Association caregivers helpline that he had offered to his clients.

Initially mad, overwhelmed, sad and scared, his emotions have now turned to passion and commitment. He is hoping for a cure for his dad, but also for the many clients and their families dealing with this same battle.

Like Darron, **Financial Advisor Heather Mayweather of Clarksville, Tenn.**, has multiple client families in her office who have been impacted by Alzheimer's disease. These multiple interactions have helped her evolve how she approaches the discussion to identify a trusted contact for each of her clients' accounts. She has also completed the "10 Warning Signs of Alzheimer's" online training, prepared by the Alzheimer's Association and made available to all Edward Jones associates, to help ensure she can be as proactive as possible to improve early detection.



Building economic inclusion and financial health for one million Americans by 2025

Roughly 85% of Americans are anxious about their financial well-being (**Financial Health Network » Employee Financial Health**). Edward Jones' Financial Fitness program, founded in 2020, is helping to address this issue by reshaping conversations around money and helping younger and more diverse populations improve their financial education, confidence and resilience. This program prioritizes outreach to high-need city schools in a dozen local communities and promotes access to online digital resources at edwardjones.com/financialfitness. Additionally, it ties directly to our firm's purpose by building economic inclusion and strengthening financial well-being in our communities.

Financial Fitness is a digital education initiative designed to empower high school students and adults across all generations by helping them gain a deeper understanding of the fundamentals of investing, the global marketplace and foundational financial concepts. After reaching 2,500 students in its first year, the program expanded in 2021 to prioritize high-need schools in Atlanta, Baltimore, Charlotte, Cleveland, Dallas, Denver, Kansas City, Phoenix, Raleigh-Durham, San Diego, St. Louis and western Massachusetts. In 2021, we are aiming to reach more than 20,000 high school students through 20,000 hours of financial education, more than 50% of which are expected to be delivered at high-need schools. We hope to deliver financial education to more than one million adults and youth – including 80,000 students – by the end of 2025.

Goal of >300,000 individuals and 20,000 high school students

will receive financial education in 2021 to become more financially knowledgeable, confident and resilient.

75,000 hours

of financial education for individuals including high school students in 2021.

More than 50%

Goal for high-need schools reached with financial education resources in 2021.

Estimated 80,000 students

to receive financial education by 2025, while maintaining a target knowledge gain of >40%.

Estimated 1M adults and youth

building economic inclusion and financial health by 2025 through Edward Jones' Financial Fitness program.



We are making investments of a lifetime.

During our firm's first 100 years, Edward Jones' founders laid the groundwork for a legacy of sustainability. And for the next 100, the decisions we make will work in service to our planet as much as they do to our clients and colleagues. By evaluating the firm's direct and indirect impacts on our environment, we are developing a comprehensive approach to address our future more sustainably.



Establishing a sustainability framework to propel us into our next 100 years

We take pride in deeply serving our more than seven million clients. We've been able to grow our impact over time. But mostly we've been able to learn together with our colleagues how best to serve our clients, communities and one another. Now, on the crest of our second century, it's up to us to continue to grow our impact in a new way, ensuring a high level of empowerment among Edward Jones colleagues to consider sustainability implications and adjust their daily workflows accordingly. As we embark on what we hope will be a standard-setting new framework for Environmental, Social and Governance (ESG), we will set an example for our clients, colleagues and communities by:

- Aligning actionable strategies and measures to United Nations Sustainable Development Goals (UN SDG) targets and sharing our progress in our March 2022 report
- Quantifying the effects that sustainability and UN SDG commitments will have
- Measuring and reporting on impacts and outcomes, not just activities

To contribute to a better society, Edward Jones is working on a comprehensive approach to environmental sustainability to address:

- External environmental partnership
- Energy management
- Sustainable buildings
- Environmentally responsible material usages
- Reduction of greenhouse gas emissions
- Water management
- Traceability and life cycle due diligence
- Waste management

Establishing mutual trust with stakeholders and acting with purpose enables our firm to understand and respond to the changes happening in the world. We want to ensure we are growing our impact as we grow our business.

Sustainable investing. Sustainable solutions.

We keep sustainability at the heart of everything we do, and that includes offering our clients ways to work ESG criteria into their portfolios.

Many studies show that individual investors are increasingly interested in making a positive impact with their money. In fact, 33% of total assets under professional management in the United States – 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 continuing to work with our product partners to identify sustainable investing solutions that are appropriate to make available to our clients.

While we believe sustainable investments can in many cases help investors achieve their financial goals as part of a diversified portfolio, it is important to understand the options available and any risks associated in view of each investor's individual circumstances.



Helping our clients and communities live and invest in a future that is more sustainable

The success of Edward Jones' sustainability efforts depends on its people. Allowing everyone to contribute to and benefit from societal ecosystems and opportunities helps individual clients and members of our communities live with dignity and longevity, which is key to a sustainable future. These principles will be advanced by our success in:

- Committing to a sustainability strategy that focuses on our economic, environmental and social impact in a holistic framework to achieve significant goals
- Extending our environmental stewardship by tracking environmental and energy metrics throughout our business operations
- Encouraging our associates to think like owners and reduce their own environmental footprint – at home, at work and in their travels
- Helping our communities thrive through habitat restoration and preservation – such as our more than 30 years of support for the **Katy Trail** and contributions to community green spaces such as the St. Louis **Brickline Greenway** project
- Investing deeply into our digital strategy – our increased use of digital technologies has allowed us to reduce our paper consumption
- Helping our clients live and invest more intentionally through digital statements and sustainable investing



"Edward Jones does so much more than call St. Louis 'home.' They will help make it feel like home to millions of residents through their pledge of support for our local greenways, which were a vital lifeline at the height of the pandemic to boost both physical health and mental well-being. We appreciate their leadership and commitment to advance the Brickline project, which recently received national recognition joining the **High Line Network** of projects transforming underutilized infrastructure into new urban landscapes."

Susan Trautman,
Great Rivers Greenway CEO



The Legacy of the Katy Trail

Since 1990, Edward Jones has been a significant supporter of conservation efforts to reclaim and maintain the Katy Trail, a nearly 250-mile recreational trail along the Missouri River. The longest recreational trail in the country, the Katy Trail State Park now hosts more than 400,000 hikers, cyclists and naturalists annually.

Habitat restoration of the trail along the abandoned Kansas-Missouri-Texas Railroad bed remains a point of passion, purpose and pride since Pat and Ted Jones (Edward Jones' second managing partner) first contributed \$2.2 million to its development 30 years ago. They understood the importance of philanthropy and its ability to build stronger communities and inspire future generations. We maintain our support of the Katy Trail to keep Missouri beautiful and sustainable while honoring their legacy.

Pat and Ted's impact on the firm's heritage of conservation cannot be overstated. Pat Jones donated the farm she shared with Ted for decades to the Missouri Department of Conservation in 1997 so that it would be preserved, restored and used to teach others. She believed in leaving things better than you found them, and her deep concern for future generations continues to inspire our firm.

From our work to develop carbon-footprint metrics to green building and sustainable best practices at our home office campuses, Edward Jones is working to safeguard our associates, reduce waste and protect and restore natural habitats. We will continue to find ways to minimize our environmental impact – and while we have made progress, we recognize there's still work to be done.



When more people thrive, our community is more robust, more attractive to families and businesses, and much more likely to be competitive for investment and growth opportunities.



Partnering for positive impact.

Our colleagues demonstrate time and again that when we bring together our collective resources, reach and resolve, we create amazing opportunities for individuals, families and communities to thrive. There's a lot of great work being done at Edward Jones, by a lot of great people, and more work to do in partnership with nonprofit organizations. By supporting good causes, we bolster their mission and ability to reach underserved stakeholders. Through our example of working side by side with more than 14,000 community organizations, we unleash extraordinary human potential – inspiring future generations to invest in and support their communities and connect to their own purpose in a way that creates shared value.

Giving until it feels great

In 2020, Edward Jones contributed approximately \$25.7 million through corporate, Foundation and associate philanthropic support. We supported 254 unique organizations across a wide variety of causes to create continued collective impact. We anticipate more than \$150 million in philanthropic contributions through 2025 in communities across the United States and Canada. As part of that five-year goal, we will build upon our legacy of community engagement in the St. Louis region, our hometown for nearly 100 years, with an anticipated \$80 million in philanthropic giving toward inclusive growth and community well-being. We are hopeful we will create a model of impact that will be replicated in other communities we call home.

Three inspired examples of Edward Jones philanthropic giving include the Arts and Education (A&E) Council, United Way of Greater St. Louis and The Terry Fox Foundation in Canada.



Approximately

\$25.7 million

contributed in 2020 through corporate, Foundation and associate philanthropic support to 254 unique organizations.

Of the \$25.7 million,

**\$16 million
donated locally**

in 2020 to revitalize, nurture and strengthen the St. Louis community.

The \$25.7 million in
philanthropic giving

was allocated in the following categories:

68%

Health & Social Services

9%

Culture & Arts

7%

Community & Economic Development

7%

Civic & Public Affairs

4%

Education, Higher

2%

Disaster Relief

2%

Environment

1%

Education, K-12

Continued investment in the arts

Edward Jones has partnered for positive impact with the Arts and Education (A&E) Council since 1978. During the lifetime of the relationship, the firm has contributed more than \$12 million to grants and programs. In 2020, our tradition of supporting the arts remained constant and was particularly vital with so many entertainment venues darkened by the pandemic's lockdown. A&E invests in the people and organizations that create diverse performances, exhibitions, workshops, art education programs and so much more for 1.6 million adults and children across our region each year. The firm is one of dozens of companies and organizations across the bistate area to host giving campaigns for the Arts and Education Council.

The goal is simple: to ensure that the region is rich with arts and cultural experiences for all. The arts can help shape a more vibrant community by inspiring us to think and connect more creatively. They also build bridges among cultures, energizing communities and our economy to enrich our lives.

In January 2020, Edward Jones Managing Partner Penny Pennington and her husband, Mike Fidler, went above the gift of money to co-chair the A&E Council's Annual St. Louis Arts Awards – which the firm has supported for each of the 30 years that the Awards have taken place.



"The arts help us observe and experience life and people with all our senses, enriching us in unexpected ways. Art brings us joy and provokes new thoughts and ideas in ways few other endeavors can provide."

Penny Pennington,
Managing Partner, Edward Jones

United Way service helps us all

In addition to time and talent, Edward Jones and its associates have contributed in excess of \$90 million to the local Greater St. Louis community through the United Way during the last 25 years. This United Way chapter – much like its counterparts in cities all over the country – connects thousands of people, including our colleagues and family members in need, to vital resources like food, safe havens, mentorship for young people, job training and more. The health, well-being and livelihood of individuals and families across this community is improved through our work with United Way member organizations. They lead our community in supporting and maintaining the region's safety net of nonprofits that help keep our neighbors whole. Supporting the United Way serves as a destination for our leaders to apply their skills through volunteering, community development and thought leadership – which help build capacity for these nonprofits to accomplish more.

United Way of Greater St. Louis provides funding to a network of local nonprofits that serve people in 16 counties throughout Missouri and Illinois to create strong and healthy communities. At the peak of the pandemic in March 2020, the United Way partnered with other community stakeholders to utilize its free and confidential 2-1-1 helpline to connect people during this time of uncertainty to resources and services – receiving nearly 43,000 calls for help during the initial three months.

Having increasingly grown the annual associate giving campaign year-over-year to one of the largest in the country, Penny Pennington will chair the United Way of Greater St. Louis campaign in 2022 as an extension of the firm's Centennial celebration.



"Our Core Causes Campaign is led by incredibly talented and dedicated associates who selflessly volunteer their time and talent for the benefit of others – some who are colleagues and some who we will never meet. This is simply one tangible demonstration that our culture of caring and our belief that together we can overcome will result in significant impact. I'm still moved by one volunteer who gives because of the love she received after losing a child and, separately, a sibling. Our authentic connections with one another create an unshakable momentum."

Jodi Foltz Gay,
Executive sponsor of Edward Jones
Core Causes Campaign

Inaugural Canadian national purpose partnership

Giving back to the communities where we live is an important part of our culture. In early 2021, we were excited to introduce our support of The Terry Fox Foundation in Canada and their mission to find a cure for cancer by funding outstanding research.

Our recent Age Wave study also confirmed that after Alzheimer's, cancer (24%) is the most feared condition among Canadian retirees – more feared than COVID-19 (18%), stroke (16%) or heart attack (8%). We also sought a partnership with a Canadian charity whose values aligned with those of Edward Jones, and we found Terry Fox's story to be one of strength, passion, selflessness, determination, optimism and hope.

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 9 months later. Four decades later, his legacy lives on, and The Terry Fox Foundation has raised over \$850 million in his name and funded 1,300 innovative cancer research projects, bringing hope and health to millions, to fund all types of cancer research projects, with a focus on the most difficult and incurable cancers.

As a leading national charitable organization, The Terry Fox Foundation plays a vital role in building community, hosting nearly 1,000 local runs across Canada that welcome participation with no fundraising minimums. We are striving in our inaugural year to have an Edward Jones participant at more than 50% of the local Terry Fox runs – with a goal to raise \$300,000 for long-term, cutting-edge cancer research projects.

"We selected this inaugural purpose partnership for Edward Jones Canada after surveying colleagues across our home office and 15 regions in Canada to determine the charitable cause that mattered most."

David Gunn,
President, Edward Jones Canada



\$300,000 commitment

to The Terry Fox Foundation in 2021 as part of the inaugural Edward Jones Canada national purpose partnership.

Supporting our colleagues and communities when disaster strikes

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. During the coronavirus pandemic, more than 1,800 associates and retirees generously contributed to the fund in order to support colleagues in need. More than \$600,000 was distributed in 2020 to provide assistance to associates and their families across the firm's U.S. network.

In 2020, there were 416 natural disasters worldwide, but none quite like the COVID-19 pandemic. In response, the Edward D. Jones & Company Foundation donated \$2.7 million to support national, regional and local charities, including the American Red Cross, Food Banks Canada, the United Way in our home office cities, the St. Louis COVID-19 Regional Response Fund and five local hospital systems in St. Louis, Arizona and Canada.



Edward Jones responded on behalf of our associates as well, offering additional benefits to support them and their families through the pandemic, including:

- 10 additional paid days off to be used for COVID-19 purposes
- Waived deductibles for the testing and treatment of COVID-19
- New programs for mental and emotional health for all
- An expansion of the number of free mental health visits our plans offer
- Tips and resources to help parents navigate virtual learning and home schooling
- A new video series for associates, "Coffee Chats," featuring people with expertise in a range of subjects centered around wellness
- A range of physical activity programs that associates could easily incorporate into their workday
- An increase in the firm's remote connections from 15,000 to 50,000
- Access to onsite COVID-19 vaccination for home office associates

More than \$600,000

distributed in 2020 to associates from associates' and retirees' contributions for disaster relief.

Multiyear investments in our communities

Business can be a powerful force for good when companies deeply invest through multiyear commitments that proactively help communities address big challenges. This long-term focus can create lasting improvement and lead to positive outcomes for stakeholders.

By co-creating a strategic plan for our communities, with our communities, and starting in our hometown of St. Louis, we are hopeful we can create a model of impact that can be replicated in other communities throughout North America.

Our multiyear contributions in Greater St. Louis, Inc., Brickline Greenway and Urban League of Metropolitan St. Louis will be focused on advancing inclusive growth and community well-being.

We will partner with organizations to achieve more together than we can do alone and build upon our success to enable St. Louis and all our regional family members to thrive.



Greater St. Louis, Inc.

The St. Louis region has changed in many ways since Edward Jones was founded, but in recent years, it has fallen behind peer cities. That's why we are supporting the Greater St. Louis, Inc. STL 2030 Jobs Plan, an ambitious road map that will help our region grow and prosper over the next decade.

As a firm that has long been committed to our region, we believe this plan aligns with our own desire to positively impact people's lives. It aspires to grow the number of quality jobs in the area, expand diverse entrepreneurship and increase the amount of local buying, hiring and investing. Investments in local collaboratives will mean that more businesses can hire more people locally and purchase goods and services from the local community.

All of us who live and work in St. Louis are interconnected, and we are all invested in one another's future and that of our region. We find the focus on collective impact among courageous leaders across the area to be inspiring. After the COVID-19 pandemic revealed the inequity in the region's economic systems, it's clearly time for meaningful, positive systems change toward inclusive economic growth that will serve to lift us all.

This effort will take the entire region working together in order to accelerate enduring, positive change that will strengthen St. Louis' sense of community and collaboration. Edward Jones looks forward to contributing to the effort to build a truly prosperous and inclusive region.



Brickline Greenway

As a member of the St. Louis business community with a vested interest in attracting new businesses and jobs to our region, Edward Jones supports the Brickline Greenway project, which has been deemed a critical priority under the "Restore the Core" strategy of the STL 2030 Jobs Plan.

Part of a growing 128-mile network of greenways across three counties, this project proposes up to 20 miles of greenway connections through 17 neighborhoods in the core of the city. The Brickline Greenway's network of accessible paths aspires to become part of St. Louisans' everyday experience - connecting them to their schools, workplaces, neighborhoods, civic and cultural institutions and new spaces along the way.

For Edward Jones, green space - together with the expansion of entrepreneurship, affordable housing and public transit - has the potential to revitalize the region and close historic environmental inequities. The road map for the Brickline Greenway calls for deep community engagement, innovation in governance, art at its core, sustainability strategies and equitable practices, serving as a catalyst for economic growth and opportunities for all. It recently received national recognition, being invited to join the High Line Network of projects across the country transforming underutilized infrastructure into new urban landscapes.

We believe our firm has a responsibility to work in partnership with like-minded stakeholders to nurture our communities and provide greater opportunity for our citizens. When more people thrive, our community is more robust, more attractive to families and businesses, and much more likely to be competitive for investment and growth opportunities.



Urban League of Metropolitan St. Louis

Partnering for positive impact is about more than programs - it's about investing in people and making a difference in their lives for the long term. Our relationship with the Urban League of Metropolitan St. Louis dates back more than 40 years. Their new headquarters was once home to Sears, Roebuck & Co., which by the 1960s was one of the region's major department stores. It was an iconic beacon and great equalizer in many ways, providing residents in the active and dynamic neighborhoods of North St. Louis access to goods and services through the Sears catalog.

Today, the Urban League of Metropolitan St. Louis offers opportunity and hope at this same location. From providing COVID-19 vaccines, housing assistance and lifesaving PPE to offering neighborhood safety programs and food, the Urban League makes an investment in human beings, in families, in neighborhoods and in our St. Louis community.

One such investment is the Urban League's Save Our Sons program, which provides job training and career opportunities for African American and Black men in our community. During the pandemic, Save Our Sons has helped 300 men find local jobs and careers by offering services such as skill building and job placement. By providing job applicants with a professional look, the Save Our Sons program also helps to restore dignity - another great equalizer.

Additionally, Edward Jones is in the early stages of co-creating a financial empowerment program for Urban League clients - helping them save and invest in their own financial future and build generational wealth for their families and community.



Culture in action

Every day at Edward Jones, our purpose comes to life in more ways than we can ever hope to capture. The generosity and compassion our associates bring to their communities remains a key strength of the Edward Jones culture felt in cities and towns coast to coast. These are just a few of the stories that illustrate how we grow our impact.

Dothan, Ala.

Seven Alabama branches came together to let frontline responders know their work fighting COVID-19 wasn't going unnoticed by purchasing 600 Boston butts from Butt Face BBQ in Dothan. Area health care centers and first responders were the recipients, with Financial Advisor Brandon Apida noting, "We're hoping that they get a feeling of appreciation and a feeling of relief. We all know, whatever job we have, we work, we come home and it's dinner time, and it's another job we all have as parents and family leaders."

Forest City, Iowa

In 2012, when their son entered West Point, Financial Advisor Mark Frakes and his wife, Carolyn, initiated the "Boodle Box" projects, which focuses on giving back for the service and sacrifice of the nation's military service members. During the past nine years, together with the Frakes, Edward Jones financial advisors, their families and branch office administrators have packaged and shipped more than 1,500 boxes of food treats and supplies to military members serving in a combat zone.

Inverness, Fla.

Financial Advisor Scott L. Lee started a program a few years ago that is a joint effort between the Citrus County Education Foundation, soliciting community donations to launch the Manatee Investment Fund. Through an application process, high school sophomores and juniors are chosen to participate in the Nature Coast Investment Practicum – a program designed to teach general accounting and economic principles while investing real money. Lee partners with other community leaders and school district faculty to teach students analytical skills, working in teams, writing research reports and public speaking. As the Manatee Investment Fund grows in value each year, annual scholarships are awarded to a select number of exemplary students.

LaCrosse, Wis.

Financial Advisor Justin Wise and his branch office administrators, Tamie Batzel and Kari Winkler, in collaboration with several other branch teams in his region donated 10,000 personal protective masks to the Law Enforcement Center to be used by first responders in the county. Connecting with a source from outside of Wisconsin, the mission of the cause was simple: "help those who help the community."

Monroe, N.C.

Financial Advisor David Smith, AAMS, co-chairs a committee dedicated to making diversity and inclusion an intentional priority for the Union County Chamber of Commerce. One of the committee's tasks is to gather data from local businesses, which then is used to develop programming to meet the community's specific needs.

Rutland, Vt.

Financial Advisor Caitlin Perry serves as president of the Rutland South Rotary Club, and she focuses on raising funds for local education and youth-based projects. In 2020, she called on the community to help support young people's dreams and inspire others to support those projects as well.

Seattle, Wash.

The 350 Edward Jones offices of western Washington in the Greater Seattle area proudly celebrated 10 years of supporting their local Toys for Tots campaigns in 2020. Branch Office Administrator Becky Woodworth gathered more than 550 toys and coordinated over \$43,000 in new and unwrapped toys for the children of the Kitsap Peninsula.

The reach of Edward Jones allows us to deepen our impact in the communities we serve, including branch offices in 68% of the counties in the U.S. and clients in every county except for one.

Data privacy and cybersecurity

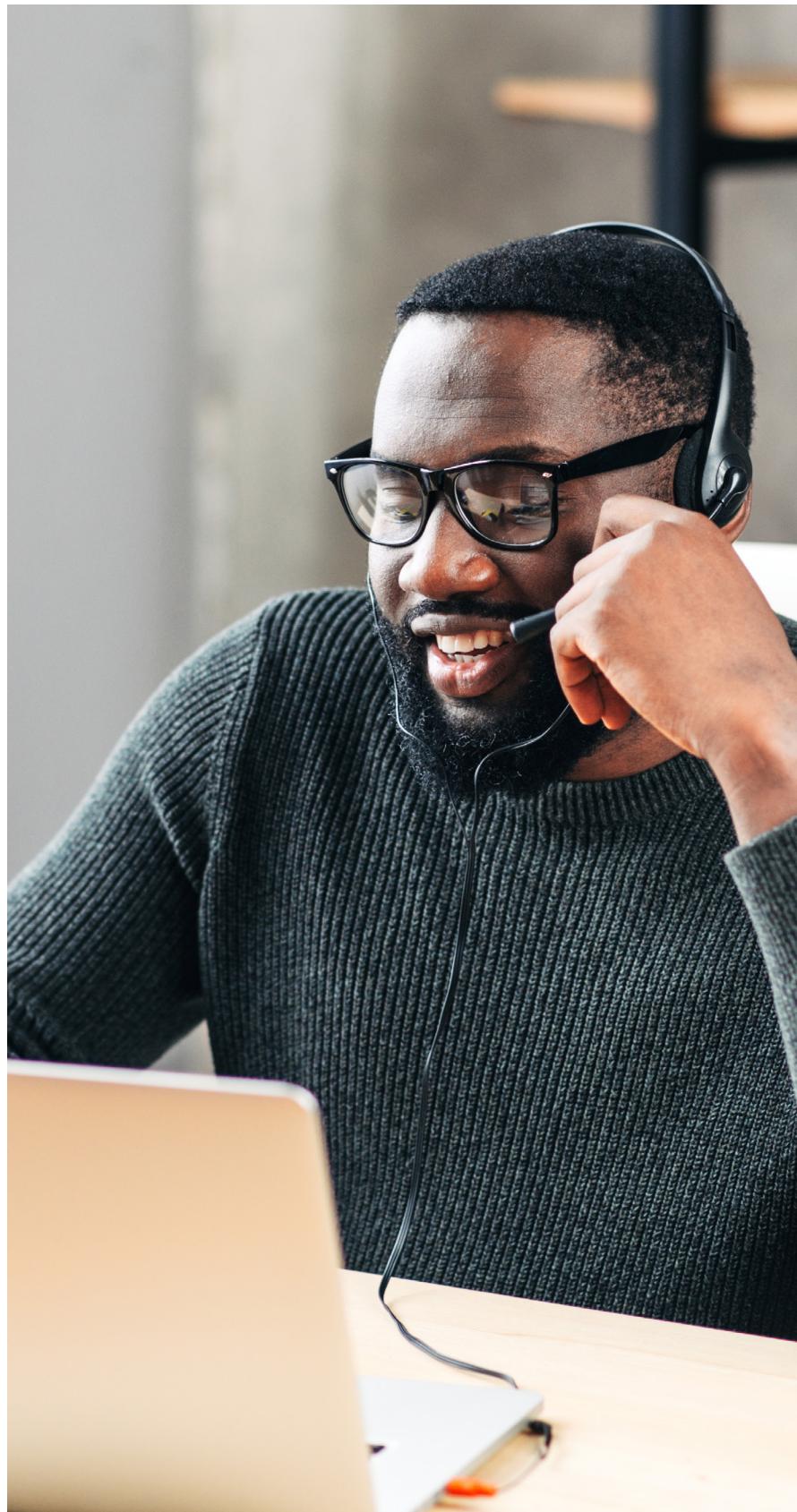
Data privacy and cybersecurity are taken very seriously at Edward Jones. We take proactive steps to prepare our cyberattack defenses to mitigate the risks of an attack.

We have multiple lines of cyber defense that we've proactively established that are intended to thwart malware and ransomware attacks:

- We aggressively block emails that show characteristics of having a high level of risk – particularly important since email is a prime culprit of security problems.
- We patch potential software vulnerabilities in as near to real-time as possible and ensure that interactions with our systems require two-factor authentication.
- We monitor anomalous activity inside and on the perimeter of our network to counter potential attacks. We also have robust incident response and business continuity plans to mitigate the impact on operations of an attack.

Of course, we also place a high priority on protecting our clients' personal information. We only share personal information with companies with which we have a relationship and who we screen carefully. We never sell or provide information to allow other companies to market to our clients.

To learn more about how we keep clients' personal and financial data confidential, visit edwardjones.com/privacy.



Looking forward

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. Through enabling organizations to choose from among 17 goals, 169 targets and 230 related indicators, 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. And a significant one at

that, through the ways we partner on environmental responsibility, supporting good causes and making a positive impact on society. We've chosen to respond to some of the most pressing challenges of our time in a way that Edward Jones knows well – through our culture of caring.

This year, we are showing how our current and ongoing initiatives align with the UN SDG framework. Soon, we'll be defining targets and measures for a targeted selection of six SDGs that will enable us to grow our impact and deepen our relationships with our clients, colleagues and communities. Accomplishing our goals will take exceptional effort, innovation and collaboration. To fulfill our responsibilities and commitments, our work aligned to the applicable SDGs will be integrated with our short-, medium- and long-term business strategy and operations, which support our enterprise measures. We look forward to sharing our progress in our 2022 report.



Positive influence on society

Giving everyone a voice

Equitable hiring, training, promotional practices and policies – diverse representation by 2025

Conducting an analysis of pay

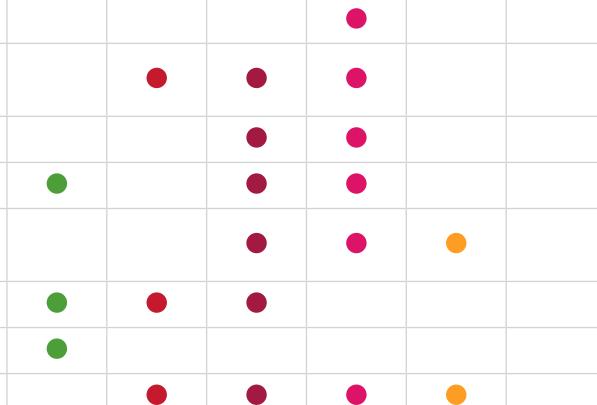
Racial-equity training and anti-racism personnel policies – a best place to work for all

Supporting organizations and programs important to our clients, colleagues and communities – investing in people, offering jobs and opportunity for all

Care and support for our associates' physical and emotional well-being

Ending Alzheimer's

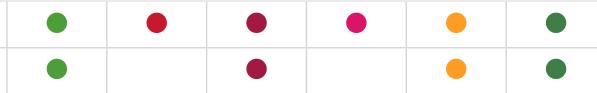
Building economic inclusion and financial health for one million Americans by 2025



Environmentally responsible

Establishing a comprehensive ESG framework to propel us into our next 100 years

Helping our clients and communities live and invest in a future that is more sustainable

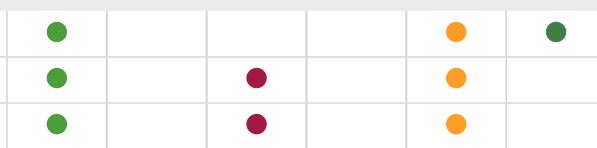


Support good causes

Giving until it feels great

Supporting our colleagues and communities when disaster strikes

Multiyear investments in our communities



About Edward Jones

Edward Jones, a Fortune 500 company headquartered in St. Louis, provides financial services in the U.S. and, through its affiliate, in Canada. Every aspect of the firm's business, from the investments its financial advisors offer to the location of branch offices, caters to individual investors. As of June 25, 2021, the firm's 18,855 financial advisors served more than seven million clients with a total of \$1.7 trillion in assets under care. Visit edwardjones.com or the recruiting website at careers.edwardjones.com. Member SIPC.

Our home office locations

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

Our purpose

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

Our accolades

- 2021 J.D. Power U.S. Full-Service Investor Satisfaction Study – Highest Ranked
- 2021 J.D. Power U.S. Financial Advisor Satisfaction Study – Highest Ranked
- 2021 FORTUNE 100 Best Companies to Work For (No. 20)
- 2021 FORTUNE Best Workplaces in Financial Services and Insurance (No. 5)
- 2020 FORTUNE Best Workplaces for Parents (No. 7)
- 2020 FORTUNE Best Workplaces for Millennials (No. 2)
- 2020 FORTUNE Best Workplaces for Women (No. 5)
- 2021 Human Rights Campaign Corporate Equality Index – 100%
- Training Magazine Top 125
- Barron's Top 1,200 Financial Advisors (state by state)
- Forbes Top Women Wealth Advisors

Edward Jones named #1 place to work in 17 separate cities or states based on independent, third-party surveys of its associates including communities like Dallas, Texas, Raleigh-Durham, N.C., and Kansas City, Mo.

Our impact:

Over 7 million

clients

**15,377 branch
locations**

throughout North America

Approximately
50,000 associates

**17,249 branch office
administrators**

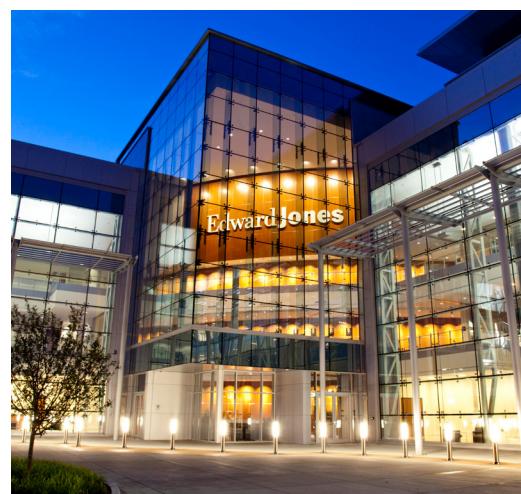
18,855 financial advisors

\$10.1 billion

2020 annual net revenue

\$1.7 trillion

in assets under care



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/deeplyinvested.

To learn more about Edward Jones careers, visit 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.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.