

Miami, A Growing City With Remarkable Opportunities

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Miami stands out from 35 Metropolitans

Rank of Market Potential Index	Metropolitan	Population (2020)	EJ Advisor number (2021)	Population/Advisor	Affordability Index*	Market Potential index**
1	Miami	6,138,333	45	136,407	7.1	19,160
14	Atlanta	6,089,815	272	22,389	7.3	3,399
35	Seattle	4,018,762	450	8,931	8.8	1,013

The Market potential index of Miami is almost 20 times higher than Seattle.

* Affordability = Median house price/Median income

**Market Potential Index= (Population/Advisor number) / Affordability Index

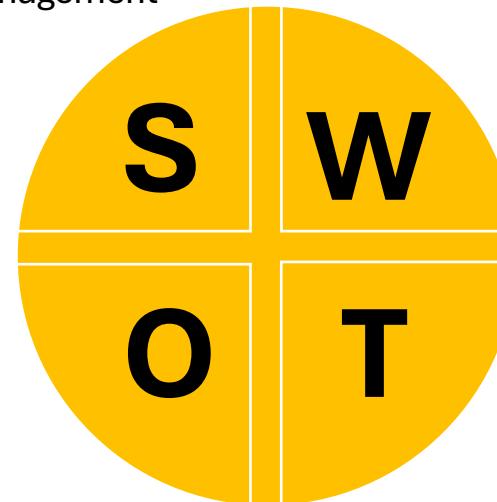
SWOT Analysis of Edward Jones in Miami

Strengths

- Served individual investors
- Retention of financial advisors from a variety of professions
- Established long-lasting customer relationship management
- Well-disciplined service
- Conservative investment

Opportunities

- Income tax free, population growth >10%
- The 6th fastest growing region in the US with an increasing number of old people/retirees
- Lower poverty rate compared to other cities
- Vast public transportation system



Weaknesses

- Limited number of EJ resources available in Miami
- Increased complex products required by customers
- Higher quality service & stronger relationship with EJ Advisors required by investors
- Slow to adapt to technological changes

Threats

- Stagnacy of business activities and economic shrinkage due to COVID-19
- Increasing online services and technologies
- Customers have more knowledge due to the increased access to information with all new technologies
- High rent in Miami

Strategic Proposed Market Expansion in Miami

To grow to 200 financial advisors in Miami by 2030, by offering trusted and convenient face-to-face financial advice to conservative individual investors in stocks, bonds, mutual funds and ETFs, through a network of one-financial adviser offices.

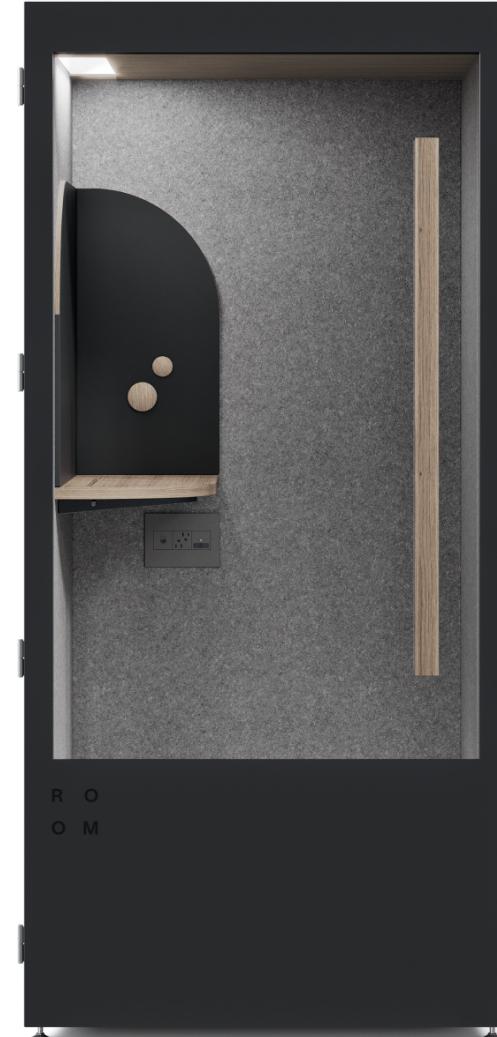


Economic Objective

Increase net revenue 5x in 5 years,
comparable to the current profit in Atlanta.

Implementation

- Share offices with other businesses but ensure private space for customers.
- Rent offices close to the public transportation system in the city.
- Incorporate convenient mini video booth office.





Thank you!

Edward
Jones

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