

Serving Deeply

Caring for more clients, colleagues and communities, more completely

2025 Purpose, Inclusion and Citizenship Report

As a firm, we are fueled by 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. This report highlights the many ways we fulfill our purpose throughout our firm.

As we move into Edward Jones' 103rd year, one foundational belief continues to guide our actions: we have a responsibility to leave people and places better than we found them. To that end, this year's report is structured to highlight just how we're improving the lives of our clients and colleagues, and bettering our communities and society.



To learn more about how we're making a difference, download the full report at edwardjones.com/servingdeeply.



Improving the Lives of Our Clients

We're improving access to financial resources, education and guidance, bolstering the confidence and resiliency of more families, including those we have yet to serve.

We take this responsibility seriously. More than 9 million clients trust the experience of our more than 20,000 financial advisors with their needs and aspirations, and we're continuously evolving our practices to better serve and support them.

Improving the Lives of Our Colleagues

We're creating more opportunities to enhance the health and well-being of our associates. Serving our clients deeply starts with the care and support we provide our associates in all aspects of their mental, emotional, physical, financial and social well-being.

Edward Jones' culture comes to life when we support each other, share knowledge and successes and lift each other up in times of need.



Bettering Our Communities and Society

Donating our time, resources and skills remains a hallmark of our culture. We're continuing to invest in lasting financial strength, promoting healthier futures and advancing economic growth. It's the innovative ways we seek to serve deeply that set Edward Jones apart.

Serving Deeply: At a glance

Improving the lives of our clients

More than 20,000

financial advisors serve more than 9 million clients

\$2.2 trillion

in client assets under care

More than 1 million

learners reached through our Edward Jones Financial Fitness program since 2020



Improving the lives of our colleagues

No. 1

in the industry for most CFP® professionals, with more than 4,500 associates in the U.S. field and home office as of Dec. 31, 2024¹

No. 1

in the industry for the most FPQP® designees among our client support team professionals

More than 2,900

financial advisors are active in new practice models (i.e., financial advisor teaming, multi-financial advisor offices, Associate Financial Advisor (AFA), etc.), surpassing the year-end goal of 2,500

¹ As reported by CFP® Board.

Bettering our communities and society

\$47.4 million

contributed through corporate, Edward Jones Foundation and associate philanthropic support, to organizations representing a wide variety of causes

308,107

volunteer hours logged in 2024

More than \$51 million

raised for Alzheimer's Association® through associate giving and corporate contributions since 2016

More than 1 million CAD

raised to support the Terry Fox Foundation since 2021

