

**Edward Jones**<sup>®</sup>



# Serving Deeply

**Caring for more clients, colleagues and communities, more completely**



# Our purpose: To partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society.

**About this report:** Edward Jones is a leading financial services firm in the U.S. and through its affiliate in Canada. As of Dec. 31, 2024, the firm's more than 20,000 financial advisors serve more than 9 million clients with \$2.2 trillion in client assets under care. Through the dedication of the firm's approximately 55,000<sup>1</sup> associates and our branch presence in 68% of U.S. counties and most Canadian provinces and territories, the firm is committed to serving more clients more completely to make a greater impact for generations of families and communities. The Edward Jones website is [edwardjones.com](http://edwardjones.com), and its recruiting website is [careers.edwardjones.com](http://careers.edwardjones.com).

In its seventh edition, the Purpose, Inclusion and Citizenship Report highlights the many ways Edward Jones brought its purpose to life during 2024 in pursuit of its business and community impact.

- 03 A letter from Penny Pennington, Managing Partner
- 04 2024 at a glance
- 05 Purpose-driven action
- 06 Improving the lives of our clients
- 11 Improving the lives of our colleagues
- 15 Bettering our communities and society
- 20 Leading responsibly
- 21 About Edward Jones





# A letter from Penny Pennington

Managing Partner

**We are fueled by our purpose:** to partner for positive impact to improve the lives of our clients and colleagues, and together, better our communities and society. These aren't just words on a page, they are how we focus our priorities and how we measure our success.

### We celebrated some major milestones in 2024:

- The 50th anniversary of our first Limited Partnership offering, which continues to elevate colleagues as owners of our firm and our destiny
- Growing to more than 20,000 financial advisors in more than 15,000 North American branches, meeting the increasing demand for advice. Our growth enables us to serve even more clients and communities, more completely
- Educating 1 million learners through our Edward Jones Financial Fitness program since 2020, helping people grow their financial knowledge and build resiliency

**We're improving the lives of our clients** by creating greater access to comprehensive advice and planning. With an estimated \$124 trillion<sup>2</sup> generational wealth transfer underway, client demographics — along with their needs, wants and wishes — are evolving. We are evolving too, by:

- Investing in training and innovative technologies, products and solutions that enable our financial advisors and client support team professionals to serve our clients more completely
- Serving new and existing clients in more tailored ways
- Offering clients more values-based, sustainable investing and charitable giving choices so their saving — and their giving — can make an impact where it matters most to them

### We're improving the lives of our colleagues.

At Edward Jones, we believe every person deserves the opportunity to thrive personally and professionally. We act on this belief by supporting all aspects of our colleagues' well-being by:

- Providing robust health and wellness benefits
- Investing in their career goals with ongoing training, leadership development and professional designation opportunities; for example, at the end of 2024, the Partnership had more colleagues with the CERTIFIED FINANCIAL PLANNER® or CFP® designation\* — and the Financial Paraplanner Qualified Professional™ or FPQP® designation\*\* than any other firm in the industry
- Creating a place where everyone feels they belong

We've invested in the colleague experience at Edward Jones to ensure we're an employer of choice in our industry and across all industries. Our primary goal is for every colleague to feel **their voice is respected, heard and valued.**

Nearly 15,000 colleagues from across the firm participated in events throughout the year, like our **Annual Diversity, Equity, and Inclusion Conference**, which seeks to build business acumen and foster more inclusive environments where different perspectives can thrive. Our **Better Together Summits, Business Resources Groups and ongoing programming** also help us celebrate multiple cultures, share passions, and learn from each other to deepen our connections.

### We're bettering our communities and society

by giving our time, talent and financial resources. In 2024, we gave more than 308,000 volunteer hours and \$47.4 million through corporate, Edward Jones Foundation and associate philanthropic support; and we're always finding new ways to give back. We're proud to be a pioneering partner in Financial Futures, a collaborative cohort model of economic inclusion.

We also believe health is critical for helping people establish, build, give away and pass on their wealth. In 2024 alone,

- Edward Jones raised over \$6.5 million for the fight to end Alzheimer's
- We contributed 346,000 CAD to the Terry Fox Foundation for cancer research

It is my privilege to lead alongside approximately 55,000 colleagues whose shared purpose is making people and places better than we found them. We look forward to another year of helping our clients, colleagues and communities achieve what is most important to them. I hope you'll be heartened by our colleagues' compelling stories — and the measures by which we hold our firm accountable.

Together, we are making a difference.

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

# 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, 2024<sup>3</sup>

**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

## 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



# Our purpose drives our actions

**We deeply value** our clients, colleagues and communities. To better understand our stakeholders' priorities, we conducted a materiality assessment\* with clients, financial advisors, branch associates, home office associates, future talent, community members, industry representatives, partners, regulatory representatives and investors to understand where our efforts can make a meaningful difference.

**The feedback we received** will continue to provide insight to us as we evaluate our strategic objectives, risk management and resource allocations. We've prioritized our focus on our three purpose impact areas: Partnering for Lasting Financial Strength, Promoting Healthier Futures and Advancing Inclusive Growth.

\*The materiality assessment does not mean material from a financial reporting perspective.



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

<p><b>Partnering for Lasting Financial Strength</b></p> 	<p><b>Promoting Healthier Futures</b></p> 	<p><b>Advancing Inclusive Growth</b></p> 
<p><b>We believe in the power of financial knowledge and confidence and a personal, needs-based approach to build long-lasting financial strength.</b></p>	<p><b>We work to promote the mental, emotional, physical, financial and social well-being of those impacted by health issues, so each person can live an enriching life.</b></p>	<p><b>We invest to lift all people and communities, including the underserved, by equipping more people to fully participate in the economy and build the future they want.</b></p>

**Topics most relevant to our key stakeholders: Clients, colleagues and communities**

<ul style="list-style-type: none"> <li>• Financial stability, security and freedom</li> <li>• Data privacy, security and protection</li> <li>• Colleague development and attraction</li> <li>• Transparent governance and business practices</li> <li>• Community empowerment and stability</li> </ul>	<ul style="list-style-type: none"> <li>• Colleague well-being and benefits</li> <li>• Purpose-focused investment solutions</li> <li>• Health advancement and research support</li> </ul>	<ul style="list-style-type: none"> <li>• Different and accessible offerings and services</li> <li>• Colleague engagement and opportunity</li> <li>• Policy influence on corporate responsibility</li> <li>• Responsible sourcing and partnerships</li> </ul>
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**Purpose impact outcomes:** We've committed to three purpose impact outcomes to hold ourselves accountable to our three main stakeholder groups as we bring our purpose to life.

<p><b>We will improve the lives of our clients by ...</b></p> <p>Creating greater access to financial resources, education and guidance.</p>	<p><b>We will improve the lives of our colleagues by ...</b></p> <p>Partnering for greater colleague health and well-being.</p>	<p><b>We will better our communities and society by ...</b></p> <p>Investing in economic inclusion to create opportunities for more people.</p>
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# We're committed to 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.

# We're expanding our approach to client service

Client needs and expectations are evolving quickly, with more people seeking holistic financial advice and planning than ever before. For example, according to McKinsey's 2024 Wealth Management Survey, 52% of affluent consumers now desire holistic financial advice and planning, up 79% versus 2018.<sup>4</sup> We are transforming our business to provide more financial advice to more people throughout North America.

We aspire to improve financial wellness for millions of our clients by providing access to comprehensive, professional advice and personalized planning. By helping clients establish, grow, pass on and give away their wealth, we will leave people and places better than we found them.

**Our client satisfaction scores are among best-in-class, especially for those clients receiving comprehensive advice.<sup>5</sup>**

**Edward Jones named No. 303 on Fortune 500 in 2024**



Fortune 500 published June 2024, data as of December 2023. Compensation provided for using, not obtaining, the rating.



## Our Strategic Roadmap

**Continue investing in technology to launch financial planning.** Continue to deliver comprehensive service to our clients through strategic investments in financial planning tools and technology such as MoneyGuide and Salesforce.

**Deliver access to comprehensive advice and planning, products and services at scale to serve different types of clients.** Meet the growing demand for advice and expand the scope of our services across segments.

**Attract and serve new client segments.** Expand our reach and find opportunities to connect with new clients that we have not typically served in the past or could better serve.

**Be the premier firm to start, grow, optimize and pass on a practice.** Give financial advisors greater flexibility, autonomy and choice in how they run their practice and enable client support team professionals to grow and expand in their roles.

**Become a knowledge-powered advice firm by delivering leading data-powered insights to better serve clients.** Gather expertise and wisdom from across the organization to create more capacity for branch teams and provide even greater value to our clients.

# We're focused on attracting new client segments and addressing industry trends so we can serve more clients more completely

For 102 years, we've embraced our founder's son and former Managing Partner Ted Jones' vision of bringing Wall Street to Main Street, focusing on broadening access to the capital markets for thousands of middle-class Americans often overlooked by other financial services firms. Today, we have both the opportunity and responsibility to expand our impact by serving more people in more communities, tailoring our products, services and experiences to their unique needs.

In addition to our core business, we've identified innovative ways to serve more clients more completely, especially as their needs and goals become more complex across health, family, purpose and finance. We are expanding our advice and guidance to serve high net worth clients and small businesses, and helping newer investors establish and build wealth.

**62%**  
of Americans say they struggle to prioritize multiple financial goals<sup>6</sup>

## We emphasize a comprehensive approach

As the firm evolves to serve more clients more completely, and seeks to understand their needs, wants and wishes, **three key elements** define our goals-based advice approach: discovering what's most important to our clients and why, establishing and creating personal strategies, and implementing those strategies with our clients. Goals vary by client but commonly include preparing for retirement and saving for education.

### Planning for retirement:

Advisor to  
**263,000**  
workplace retirement plans with \$96 billion in assets under care for more than 1.3 million plan participants

Helped more than  
**48,000**  
business owners start new retirement plans in the past three years


**\$974.5 billion**  
in 7.5 million Individual Retirement Accounts

### Education savings:

We work with our product partners and strategic product partners to offer  
**22 plans**  
for 529s for our clients

More than  
**876,000**  
accounts participate in 529 plans

**\$18.7 billion**  
in assets under care in 529 plans<sup>7</sup>

 [Learn more about 529 education savings plans](#)

## Educating the next generation of investors: 1 million and counting


Confidence and resiliency start with education. And this year, we're proud to announce that we've hit our goal to reach 1 million learners by 2025 through our Edward Jones Financial Fitness program.

## More than 201,000

learners reached in 2024; meeting our goal of reaching 1 million learners by the end of 2025.

### Since program inception:

- 408,069 students** reached in 7,000+ schools
- 53% of schools** reached in U.S. and Canada were high need
- 40% increase** in financial knowledge assessment score for program participants

 [Take control of your financial fitness](#)

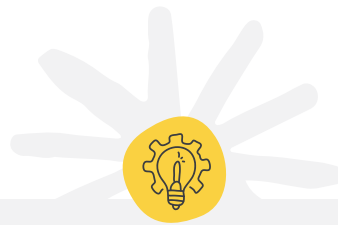




# We're aligning investment choices with client values

**Our clients' investment choices** can reflect their personal values. We provide choices to meet their needs, like offering mutual funds and exchange-traded funds (ETFs) so that clients who choose to do so can invest in values-based and socially conscious ways as part of their financial strategy.

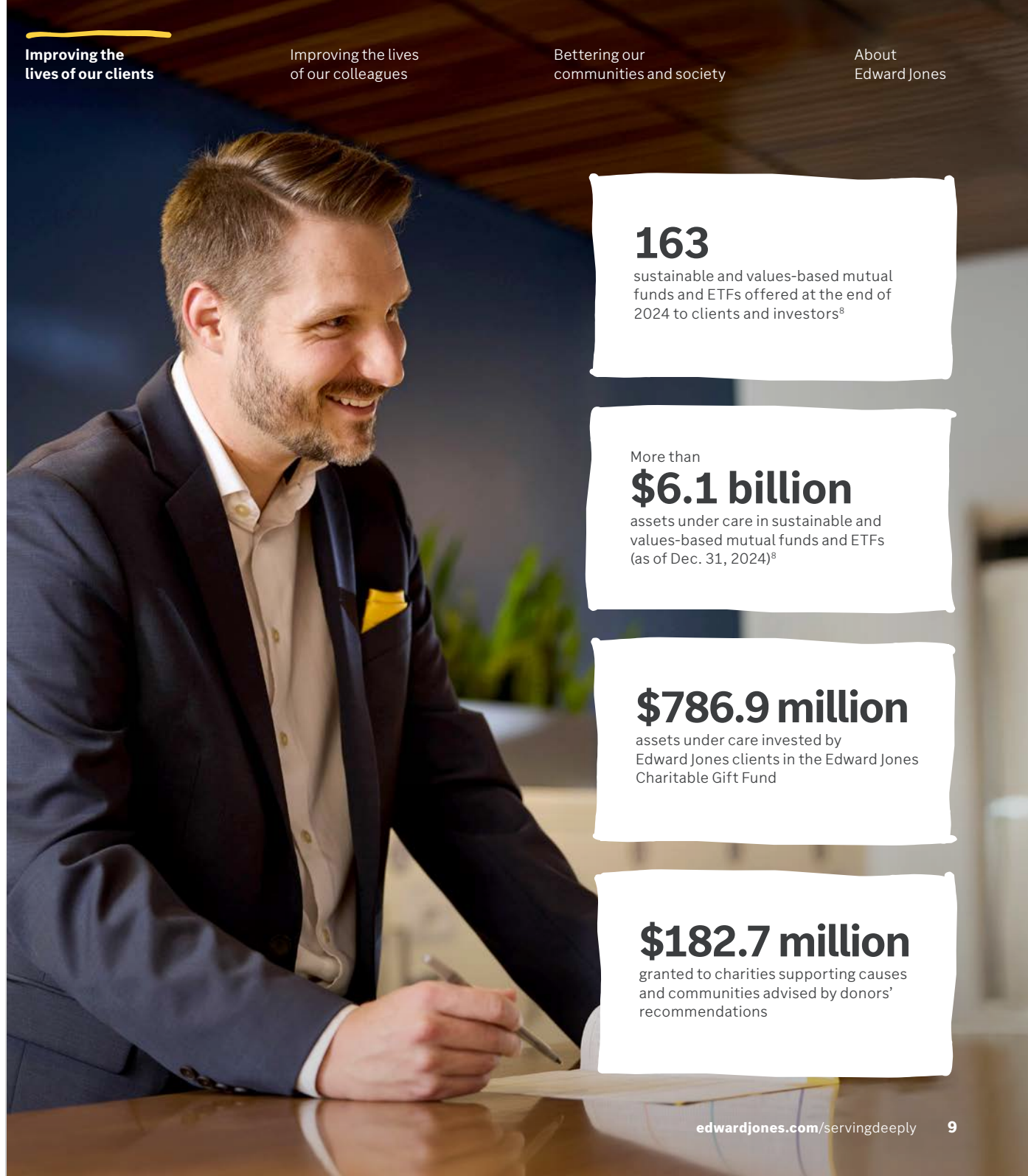
**The Edward Jones Charitable Gift Fund** helps clients leave a legacy through donor-advised funds (DAFs). A DAF is a charitable giving tool that allows clients to make a contribution to a charitable fund and potentially receive an immediate tax deduction. Over time, clients can make a lasting impact by requesting grants be made to 501(c)(3) public charities.



## We're sparking innovation benefiting future generations

**Edward Jones Ventures\*** drives innovation through venture capital investing. The team invests in cutting-edge ideas, opportunities and emerging technologies across industries to deliver solutions that may benefit our clients, investors and branch teams in the future.

\*Edward Jones Ventures is investing through JFCA LLC, an affiliate of Edward Jones.



**163**

sustainable and values-based mutual funds and ETFs offered at the end of 2024 to clients and investors<sup>8</sup>

More than

**\$6.1 billion**

assets under care in sustainable and values-based mutual funds and ETFs (as of Dec. 31, 2024)<sup>8</sup>

**\$786.9 million**

assets under care invested by Edward Jones clients in the Edward Jones Charitable Gift Fund

**\$182.7 million**

granted to charities supporting causes and communities advised by donors' recommendations

# We prioritize client protection

**Our team** of privacy and digital security experts, along with our fraud and branch supervision teams, are dedicated to safeguarding our clients, especially seniors. We continuously monitor for current and emerging threats.

Our financial advisors and client support team professionals receive regular training in cybersecurity, privacy protection and fraud prevention. They share this knowledge with clients to help keep them and their finances safe.

**We've enhanced our protections** to spot danger earlier and prevent exploitation before it occurs.



24/7/365 monitoring of systems and information



Restricted access to sensitive information



Regulatory compliance with strict security standards



Digital access controls, including the use of multi-factor authentication and data encryption



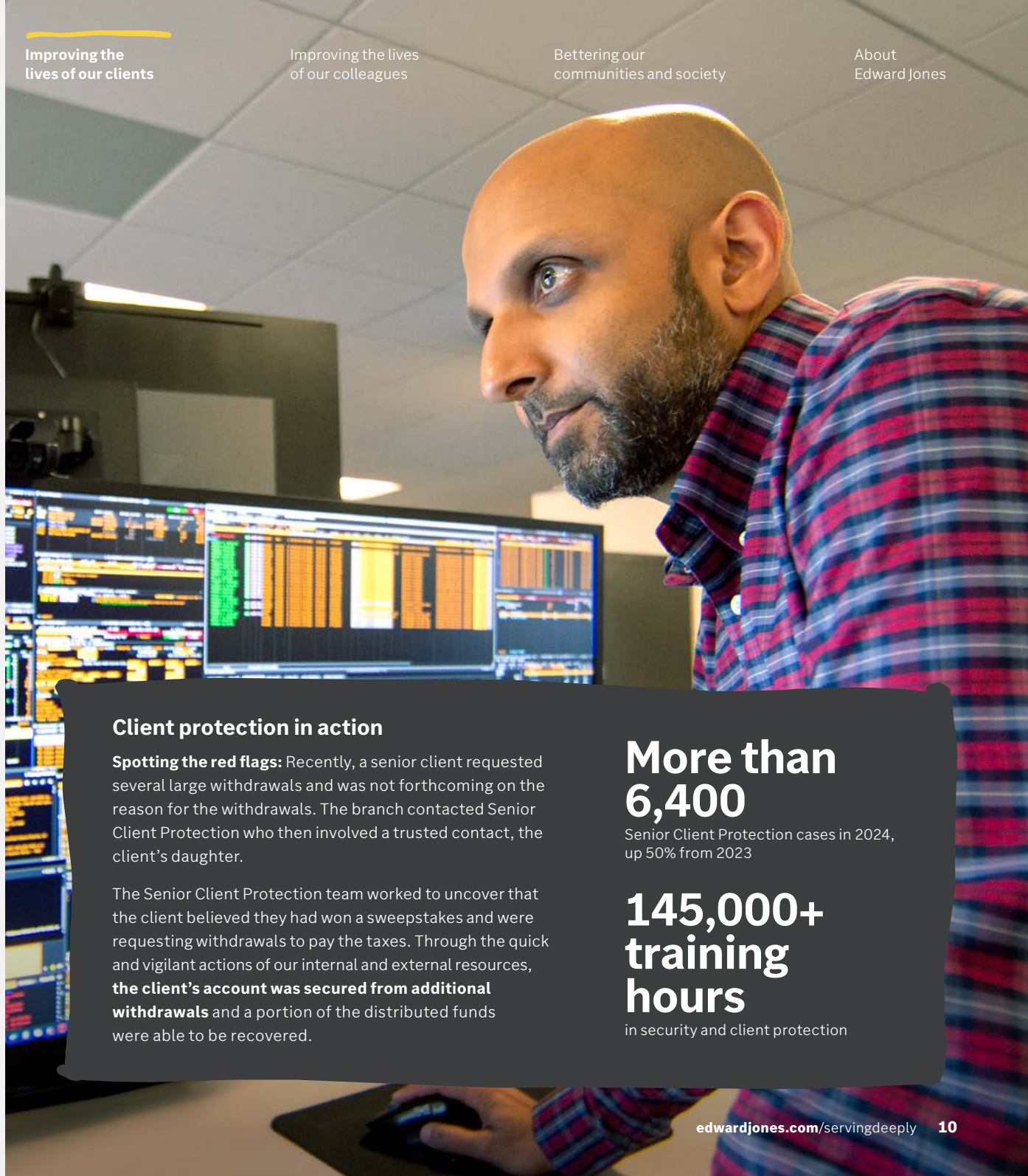
Physical access controls, such as badged access to home office real estate



Performing due diligence and monitoring on service providers that process or store personal information



System protections, such as live firewalls, intrusion detection/prevention systems and vulnerability management



## Client protection in action

**Spotting the red flags:** Recently, a senior client requested several large withdrawals and was not forthcoming on the reason for the withdrawals. The branch contacted Senior Client Protection who then involved a trusted contact, the client's daughter.

The Senior Client Protection team worked to uncover that the client believed they had won a sweepstakes and were requesting withdrawals to pay the taxes. Through the quick and vigilant actions of our internal and external resources, **the client's account was secured from additional withdrawals** and a portion of the distributed funds were able to be recovered.

# More than 6,400

Senior Client Protection cases in 2024, up 50% from 2023

# 145,000+ training hours

in security and client protection

# We're 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.

# As we work together, we grow together

**We nurture a competitive workforce** by investing in our associates' development and career growth. We offer both e-training and in-person learning to enhance industry knowledge and help us serve clients more completely.

**We're shaping tomorrow's workforce today** by training talent to meet the evolving needs of our clients. In the past year, we prepared 486 branch teams to offer financial planning, a new level of service for our clients.

Through a unique blend of digital conversations, on-site gatherings in St. Louis and on-the-ground work at the University of Virginia's Darden School of Business in Charlottesville, VA, our financial advisors and client support team professionals have **transformed the way they think about their practice and our industry.**

## Recognition matters

Taking the time to recognize our associates for their work both in the office and in their communities is a central part of our culture. Our Spirit of Caring Awards recognize the values, cultures and spirit of giving back.

**6,831**  
service anniversary awards

**665**  
Spirit of Caring awards

**6**  
recognition conferences



## Industry designations and certifications



### No. 1

in the industry for most CFP® professionals, with more than 4,500 in the U.S. field and home office as of Dec. 31, 2024

### Approx. 1,300

Edward Jones U.S. field and home office associates earned the CFP® designation and/or Chartered Financial Consultant® or ChFC® designation in 2024, marking the second consecutive year Edward Jones has added more than 1,000 CFP® new certifications

### No. 1

in the industry for most FPQP® designees, with more than 1,800 among our client support team professionals

### 97

Certified Kingdom Advisors® or CKA® to build knowledge around weaving a faith-based perspective into financial discussions

## 4 new designations

in 2024, including the Chartered Special Needs Consultant® or ChSNC® designation, which provides education on serving clients who have family members with disabilities or other special needs

## We're offering flexibility, autonomy and choice for financial advisors

**New practice models** aimed at boosting client success are helping to support branch operations and provide career development opportunities. These include co-locating multiple financial advisors in shared offices while preserving individual client relationships, providing traditional teaming options, and expanding client support roles:

**500+ Registered Branch Associates (RBAs)** support the financial advisor and indirectly support clients upon meeting license requirements.

**400+ Associate Financial Advisors (AFAs)** can act independent of the financial advisor, including client prospecting, in service of the branch.

### In Canada

## Reached 131 (22%)

multi-financial advisor locations (with two or more financial advisors)

### In the U.S.

## 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

## 282

financial advisors are active in Teaming practice models, with two or more financial advisors managing a single branch location and client list collaboratively

## Ranked No. 17 in 2024 Training Magazine, Apex Awards

2024 Training Magazine Training Apex Award published February 2024, data as of September 2023, application fee required for consideration.

# We've adopted a holistic approach to associate health and well-being

**Our comprehensive benefits package** for associates and their families includes health care, counseling, nutrition and fitness resources, paid leave, profit sharing and 401(k) matching for those who are eligible.

- **Headspace**, an enhanced Employee Assistance Program, offers 24/7 mental health support for associates and their families, text-based coaching, eight free counseling sessions, traditional work life services, and over 2,000 hours of mindfulness and meditation content addressing critical gaps in prevention, access and service.
- **Our Crisis Care Team** supports associates through critical moments, including working to activate the **Edward Jones Disaster Relief Fund** to help associates recover from federally declared disasters like wildfires, hurricanes, and pandemics. In October 2024, the fund was activated for Hurricanes Helene and Milton, and approximately \$28,000 in disaster relief assistance was distributed to 15 associates and families from associates, retiree and Edward Jones Foundation contributions.



## We're helping each other in the aftermath of hurricane season

Here are some of the realities of both Hurricane Helene and Hurricane Milton:

- 132 associates reported home damage, six of these homes are uninhabitable.
  - 55 branches reported damage from both storms.
  - The Associate Relations — Disaster & Crisis Care team had 190 direct connections with impacted associates by Milton. The team handled 231 cases from Helene and 26 cases from Milton.
- In the wake of the disaster caused by Hurricanes Helene and Milton, **associates from across Edward Jones came together to support each other.**
- Branches throughout North Carolina, South Carolina and Northwestern Georgia opened their doors to serve as food drop centers for donations.
  - Region 30 raised money for financial advisors and client support team professionals to purchase 832 personal space heaters for people lacking basic utilities.
  - **Financial advisor Robert Winkler** worked with partners to deliver 12 truckloads of food and supplies to 7 cities in 11 days.

## Rewarding our associates and building long-term financial stability remains a top priority at Edward Jones

**94%**

of eligible associates contributing to their retirement through the firm's profit sharing and 401(k) plan

**7.87%**

average contribution to 401(k) among full-time associates

**More than 1,200**

Limited Partnership (LP) offers made in 2024

**\$13.4 million**

of Limited Partnership (LP) interests accepted in 2024



# We strive to be a firm for all

**Respecting and valuing the contributions of individuals is one of Edward Jones’ core values.** Leaders are responsible for hiring and developing their teams, with Edward Jones providing information about area-specific hiring and retention opportunities. Certain financial advisors take on leadership roles in their geographic areas. They develop a tailored plan to support growth, performance, engagement and leadership development within their specific markets. Edward Jones has advisory groups of financial advisors, client support team professionals and home office associates with different experiences, skills, backgrounds and demographics who offer perspective and input to help advance colleague inclusion and engagement. The firm has a dedicated team designing accessible digital experiences for clients and colleagues with disabilities.

**Edward Jones has 12 Business Resource Groups (BRGs) available for enterprise-wide membership.** Our approximately 6,000 BRG members and other colleagues come together to discuss their unique experiences, help attract and retain talent and discover ways to serve clients and future clients more deeply as demographics and needs change. Edward Jones seeks to be a place of belonging for all, where clients and colleagues feel valued, respected, seen and heard.

The following table summarizes the Partnership’s composition of financial advisors, home office general partners and home office leaders who were self-identified people of color and self-identified women as of Dec. 31, 2024:

<b>Financial Advisors</b>	People of color	10%
	Women	24%
<b>Home Office General Partners</b>	People of color	17%
	Women	37%
<b>Leaders across Home Office</b>	People of color	19%
	Women	49%



## Events that matter

Edward Jones’ Annual Diversity, Equity and Inclusion Conference brings together qualifiers across all roles to sharpen their business acumen and foster more inclusive environments where diverse perspectives can thrive. More than 400 Edward Jones financial advisors, client support team professionals and home office associates attended development sessions featuring topics such as client attraction, community engagement, Artificial Intelligence, disability inclusion and belonging.

This year’s event was themed “Building Bridges: Connecting Through Collaboration, Culture and Action” because building bridges across gaps and cultures is vital to creating the greatest impact.

Our **Better Together Summits and ongoing programming** are opportunities to build lasting impact. These experiences bring external experts and voices from across the firm together to help associates develop new ways to support each other and serve our clients. In 2024, we hosted nearly 15,000 associates during events throughout the year designed to strengthen our cultural understanding and enhance connections firmwide and within departments, regions and markets.

**11** Better Together Summits in the U.S.

**2** Virtual Better Together Summits

**2** Better Together Summits in Canada

**15** Marquee hybrid events



## Awards and rankings<sup>9</sup>

**Ranked No. 31 among Fortune 100 Best Companies to Work For**

**Ranked No. 7 among Fortune Best Places to Work in Financial Services & Insurance**

**Ranked No. 31 for Fortune Best Workplaces for Women**

2024 Fortune 100 Best Companies to Work For, published April 2024, research by Great Places to Work, data as of August 2023. Compensation provided for using, not obtaining, the rating.

2024 Fortune Best Workplaces in Financial Services & Insurance, published September 2024, research by Great Places to Work, data as of August 2023. Compensation provided for using, not obtaining, the rating.

2024 Fortune Best Workplaces for Women, published October 2024, research by Great Places to Work, data as of August 2023. Compensation provided for using, not obtaining, the rating.

# We are 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.



# We're giving back and giving forward

We're making an impact through corporate initiatives, Edward Jones Foundation and associate giving. Our focus on economic inclusion and financial resilience in our communities is positively impacting the health of our firm and industry.

## \$47.4 million

contributed in 2024 through corporate, Edward Jones Foundation and associate philanthropic support to organizations representing a wide variety of causes

## \$224 million

given through corporate, Edward Jones Foundation and associate philanthropic support, exceeding our goal of \$200 million between 2020 and the end of 2025 in communities we serve throughout the U.S. and Canada

More than

## 20,800 associates

supported more than 10,800 community organizations across North America

## 69,400+ hours

for our 2024 Day of Caring, which allows associates to spend one paid day per year participating in volunteer activities of their choice

## 282

recipients of our Field Giving Initiative, which empowers field associates to nominate the charitable organizations they care about for grants (total investment of up to approximately \$1 million)

## 308,107

associate volunteer hours logged in 2024

### Financial Futures

Financial Futures is a collaborative cohort model of economic inclusion backed by Edward Jones and aimed at enhancing economic mobility for those historically lacking it. It's a network of credit unions, agencies and more that work together, pooling resources to foster true financial empowerment. This effort strengthens communities facing systemic inequities, facilitating wealth-building solutions that transform lives by providing equity in access to information and capabilities.

### Baby Bonds: Financial Futures in Action

Financial advisor Nolan Jeter in Atlanta, Ga., is leading a collaboration between Edward Jones and the Georgia Resilience and Opportunity Fund to pilot the Baby Bonds Program. In the next four years, this unique initiative will offer 50 young individuals in Georgia a \$40,000 bond, along with financial education and advice, to support their goals of education, home ownership, small business development or retirement. Edward Jones is committed to similar programs across the country.

**Dollars for Doers and Charitable Match provides associates giving options for donating either their time or money to eligible 501(c)(3) or Canadian charitable organizations**

The Edward Jones Foundation will match eligible associate volunteer hours and charitable donations up to a combined limit of \$500 CAD/USD annually.

## \$2.9 million

deployed by the firm through Dollars for Doers and Charitable Match in 2024



# We prioritize being good stewards of the environment

Ted Jones and his wife, Pat, set the stage for how we honor and preserve our environment. Today, being good stewards of the environment remains an important consideration as we think about the future of our impact.



The firm continued its partnership with the Arbor Day Foundation with a focus on further expanding the positive impact that reforestation has on the environment. Our 2024 results include:


**64,000+**  
trees planted

**195 acres**  
restored

**More than 4.7 million**  
gallons of avoided water runoff<sup>10</sup>

**More than 45,500 metric tons**  
metric tons of CO2 sequestered<sup>10</sup>

**More than 185 tons**  
of air pollutants removed<sup>10</sup>

 [Learn more about how we're planting for positive impact](#)

# We're advancing good health for everyone

We believe pervasive health issues stand in the way of people building, maintaining and enjoying wealth in life. That's why we work to promote the financial, physical and emotional well-being of those impacted by health issues, so each person can live an enriching life.

**With Alzheimer's disease impacting an estimated 300,000 Edward Jones clients and families,** advancing the care, support and research efforts of the Alzheimer's Association as its largest corporate partner in finding a cure remains a major priority. The Edward Jones Alzheimer's Research Fund was created to accelerate science toward methods of treatment, prevention and, ultimately, a cure.

Since 2016, Edward Jones has proudly served as a National Presenting Sponsor for the Alzheimer's Association Walk to End Alzheimer's®, the world's largest fundraiser for Alzheimer's care, support and research.



## Terry Fox started a marathon against cancer. We're helping finish it.

We're proud of the contributions raised through corporate and associate giving. Together, we're helping the Terry Fox Foundation invest in the best cancer research in Canada so treatments, outcomes, and preventions that seem miraculous today, become routine tomorrow.



Join us in the fight against Alzheimer's disease

**More than \$51 million**

raised through associate giving and corporate contributions since 2016

**Over \$6.5 million**

raised in 2024

**\$11 million**

since 2016, committed to the Edward Jones Alzheimer's Research Fund

**123,000+ walk participants**

since 2016

**More than 1 million CAD raised**

since 2021 through corporate and associate giving to support The Terry Fox Foundation

# We help shape policy

We advocate through grassroots activity, lobbying and political contributions. We convene events, participate in trade associations and remain active participants in the policymaking process.

The Edward Jones Grassroots Task Force is the securities industry’s sole associate-based volunteer advocacy group that visits Washington, D.C., to address key policy issues for individual investors.

The Edward Jones Political Action Committee (PAC) is a federal committee funded by voluntary general partner contributions which help to support elected officials in Congress who support efforts aligned with our clients’ interests and our ability to serve them.



U.S. Representative Zach Nunn (IA-03) meets with members of the Edward Jones Grassroots Task Force on March 6, 2024: Financial Advisor Mark Allen, Head of Enterprise Communications Cara Knox and Sr. Branch Office Administrator Kimberly Tucker.



## Our economic impact is tremendous

With a presence in 68% of U.S. counties and most Canadian provinces and territories, our home offices and more than 15,000 branch locations impact national and local economies.

### \$25.9 billion

contributed to our nations’ GDP (U.S. and Canada) in 2024

### More than 154,000

community jobs supported in the U.S. and Canada in 2024

### \$19.1 billion

of labor income in U.S. and Canada in 2024

Edward Jones is a member, or has representatives on the boards, of the following regulatory and industry organizations:



This year, Edward Jones supported the development and introduction of *The Improving Retirement Security for Family Caregivers Act* and the *Catching Up Family Caregivers Act* in the House of Representatives and Senate in Washington, D.C. These bipartisan bills would provide additional retirement savings opportunities to the millions of Americans who provide caregiving services to family members. The firm’s Policy, Regulatory and Government Relations team, in partnership with the Edward Jones Grassroots Task Force, is advocating for the passage of these bills to help more Americans save for a secure and dignified retirement.

Edward Jones is a proud supporter of the Working Group on Inclusive Finance at the Aspen Institute Financial Security Program. The working group recently provided critical input to shape the National Strategy for Financial Inclusion in the United States announced by the U.S. Department of the Treasury in October 2024, to improve access to financial products and services and strengthen financial security.

# We are committed to being transparent, responsible leaders

**Our four core values guide us:** Our clients' interest comes first; we believe in a quality-oriented, long-term investment philosophy; we value working in partnership; and individuals and their contributions are valued and respected.



"During my first few months here, I've been inspired by Edward Jones' commitment to integrity and transparency. I've witnessed the firm's commitment to protecting retail investors, in particular seniors, against fraud and abuse. I'm excited to work across the firm to further strengthen our processes, foster a culture of accountability, and safeguard the trust our clients and associates place in us."

—Jen Grego, Principal and Chief Compliance Officer

# Edward Jones



## Our values come to life through our Culture of Compliance, which includes:

- Our **Code of Ethical Conduct**, which defines the ethical standards and principles that guide our conduct across the entire firm, as well as routine ethics trainings and our risk management framework.
- Our **Culture of Compliance program** empowers field associates to lead and educate their regions to mitigate compliance risks while maintaining the highest professional and ethical standards. Regular development sessions help build their compliance IQ, including sessions on fraud and senior client protection.

**An efficient governance structure** helps us deliver more value to more clients and families in more communities.

- Our **Enterprise Leadership Team** guides our vision, strategy and enterprise operations while advising the Managing Partner and making major capital allocations.

- **The Operating Committee** drives strategic direction, reinforces priorities for multi-year goals, monitors performance and leads resource and workforce planning.

- **The firm's Audit Committee** oversees the integrity of our financial statements, reporting processes, and external and internal auditor performance.

# Continuing the legacy of Ted & Pat Jones

In 2025, Ted and Pat Jones would have celebrated their 100th birthdays — Pat on Nov. 16 and Ted on Dec. 18. Ted and Pat remain hugely influential on so many aspects of our firm, and on our work to make a positive impact on the people and places we serve throughout North America.

Throughout the year we will be hosting several events and opportunities to celebrate the lasting legacy of Ted and Pat Jones with our clients, colleagues and our communities.



## About Edward Jones

### Our purpose:

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

### Our home office locations:

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

### Our impact:

More than **9 million clients**

More than **15,000 branch locations** throughout North America

Approximately **55,000 associates**

Approximately **25,000** full-time and part-time client support team professionals

More than **20,000** financial advisors

**\$2.2 trillion** in assets under care

**\$16,257 million** total annual revenue

## Improving the lives of our clients

	2020	2021	2022	2023	2024
<b>Financial stability, security and freedom</b>					
Education savings: # of 529 plans offered through product partners	*	21	21	21	22
Education savings: # of accounts participating in 529 plans	*	*	*	863,000	876,000
Retirement preparedness: assets under care for workplace retirement plans	*	*	*	\$84.9B	\$96B
Next-gen education: learners reached through Financial Fitness programs (cumulative since 2020)	191,000	365,700	436,000	>848,000	>1M
<b>Purpose-focused investment solutions</b>					
Sustainable investing: total sustainable and values based mutual funds and ETFs (# of funds)	*	117	133	143	163
Donor-advised funds: amount invested by Edward Jones' clients in the Edward Jones Charitable Gift Fund (\$)	*	\$225M	Approx. \$350M	Approx. \$535M	\$786.9M
Donor-advised funds: amount granted to charities supporting causes or communities, advised by donor's recommendations (\$)	*	\$7M	>\$57M	>\$90M	\$182.7M
<b>Data privacy, security and protection</b>					
Privacy and fraud prevention: senior client protection (# of cases)	*	726	1,372	>4,200***	>6,400
Security and client protection: training (# training hours)	*	*	*	*	>145,000

## Improving the lives of our colleagues

<b>Colleague development and attraction</b>					
CFP® Professionals: # of associates earned CFP® designation in 2024	*	*	*	Approx. 1,000	>1,000
New practice models: # of Financial Advisors in new practice models (U.S.)	*	*	*	>1,600	>2,900
New practice models: % of multi-financial advisor locations (Canada)	*	*	*	*	22%
<b>Colleague well-being and benefits</b>					
Associate benefits: % of eligible associates contributing to their retirement through the firm's profit sharing and 401(k) plan	*	94%	94%	94%	94%
Associate benefits: average associate contribution to 401(k)	*	7.92%	8.04%	8%	7.87%****
Disaster relief assistance: amount distributed to associates in need (\$)	*	\$328,000	Approx. \$200,000	Approx. \$242,000	Approx. \$28,000
<b>Colleague engagement and opportunity</b>					
Number of firm-sponsored, associate-led Business Resource Groups	17	*	12	12	12
Number of associates in BRGs	*	*	*	Approx. 5,000	Approx. 6,000
U.S. and Canadian financial advisors of color (%)	*	*	9%	10%	10%
Female U.S. and Canadian financial advisors (%)	*	*	23%	23%	24%
People of color in leadership in firm's U.S. and Canadian headquarters (%)	*	*	19%	19%	19%
Female leadership in firm's U.S. and Canadian headquarters (%)	*	*	49%	49%	49%
General partners of color in U.S. and Canadian headquarters (%)	*	*	14%	16%	17%
Female general partners in U.S. and Canadian headquarters (%)	*	*	32%	35%	37%

Bettering our communities and society	2020	2021	2022	2023	2024
<b>Community empowerment and stability</b>					
Financial contributions: contributions through Edward Jones corporate, Foundation and associate giving (\$)	\$24.4M	>\$26M	>\$34.3M	\$46M	\$47.4M
Organizations supported: number of community organizations contributed to	366	259	319	>5,000**	>10,800**
Volunteering: number of volunteering hours logged	*	*	*	*	>308,000
GDP contribution (\$)	*	\$20B	*	\$25.4B	\$25.9B
Community jobs supported	*	Approx. 140,000	*	163,835	>154,000
<b>Responsible natural resource management****</b>					
Reforestation: number of trees planted	*	*	11,250	25,000	>64,000
<b>Health advancement and research support</b>					
Finding a cure for Alzheimer's: funds raised for Alzheimer's Association (\$)	Approx. \$3.5M	Approx. \$6M	Approx. \$6M	\$5.9M	\$6.5M
Finding a cure for cancer: funds raised for the Terry Fox Foundation (CAD)	*	>200,000 CAD	>180,000 CAD*	>258,000 CAD	>346,000 CAD

\*Data was not published in or has been updated since the prior year's report.  
 \*\*Includes associate philanthropic support.  
 \*\*\*Criteria for a senior protection case expanded in 2023.  
 \*\*\*\*2024 represents full-time associates only.  
 \*\*\*\*\*Category was included as part of stakeholder materiality assessment but not rated as most relevant to our stakeholders.



### 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 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.



# Thank you for helping us improve the lives of our clients and colleagues and better our communities and society.

[edwardjones.com/servingdeeply](https://edwardjones.com/servingdeeply)  
[careers.edwardjones.com](https://careers.edwardjones.com)

- <sup>1</sup> Includes full-time and part-time employees and partners, including financial advisors.
- <sup>2</sup> Cerulli, U.S. High-Net-Worth and Ultra-High-Net-Worth Markets 2024.
- <sup>3</sup> As reported by CFP® Board.
- <sup>4</sup> 2024 McKinsey Wealth Management Survey.
- <sup>5</sup> NPS Prism®, Bain & Company's U.S. Benchmarks Report, 2024.
- <sup>6</sup> 2024 Annual Retirement Study from Allianz Life Insurance Company of North America.
- <sup>7</sup> As ranked by ISS Market Intelligence for Financial Advisor sold 529 plans.
- <sup>8</sup> Investors should understand the risks involved in owning investments, including interest rate risk, credit risk and market risk. The value of investments fluctuate and investors can lose some or all of their principal. Investing with a purpose is a personal choice. Investors can build a well-diversified portfolio with or without a sustainable or values-based strategy. An investment strategy that prioritizes a non-financial goal ahead of traditional fundamentals or financial returns may result in increased volatility and experience underperformance when compared to traditional strategies. Sustainable investing is a subjective practice and some of the criteria Edward Jones may use to identify investments as sustainable may not align with criteria of all clients.
- <sup>9</sup> 2025 Human Rights Campaign Corporate Equality Index perfect score recipient in partnership with Human Rights Campaign Foundation, published Equality Magazine January 2025, data as of June 2024.
- <sup>10</sup> Estimated cumulative benefits of 40 years, as provided by the Arbor Day Foundation.

