



# Growing our impact

## 2024 Purpose, Inclusion and Citizenship Report



At Edward Jones, the work we do is an extension of 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. Our sixth annual Purpose, Inclusion and Citizenship Report, Growing our impact, highlights some of the accomplishments and goals that brought our purpose to life through year-end 2023.

As a business that seeks to make a positive difference in the world through the work we do, we are addressing some of the most pressing challenges of our time in three areas where the skills and passions of our talented colleagues intersect with our ability to make the greatest impact.

We call these our Purpose Impact Areas, and our Report is organized by them: Partnering for Lasting Financial Strength, Promoting Healthier Futures and Advancing Inclusive Growth. These Purpose Impact Areas serve as a framework to guide our strategic business decisions, investments and activities.

Edward Jones has a physical presence in 68% of the counties in the U.S. and all provinces in Canada. With this impact comes a responsibility to leave people and places better than we found them. To learn more about how we're making a difference, together, download the full report at [edwardjones.com/growingourimpact](https://edwardjones.com/growingourimpact).



### Partnering for Lasting Financial Strength

We believe in the power of financial knowledge and confidence and a personal, needs-based approach to build long-lasting financial strength. This includes our work to deliver better financial outcomes and improve intergenerational mobility for our clients, helping people establish, grow, pass on, and give away their wealth; the suite of financial resources and benefits we offer colleagues; and the work we're doing to create accessibility of financial resources, education and guidance in our communities. Since 2020, we have helped more than 848,000 high school students and learners of all ages increase their financial literacy through our Edward Jones Financial Fitness program.

### Promoting Healthier Futures

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. For us, this includes offering sustainable products and services that tailor to our clients' holistic goals, needs and values; providing health and wellness tools to our colleagues to support their well-being; and partnering and advocating for greater wellness and sustainability in communities.

### Advancing Inclusive Growth

We believe every person deserves the opportunity to thrive — regardless of where they start. Our focus on diversity, equity and inclusion (DEI) starts within our firm and extends into our local communities. We're working to address a wider set of needs, income levels and backgrounds for our current and potential clients; creating a more diverse, equitable and inclusive organization for our colleagues in the process; and impacting long-term societal change through investment in equitable access to economic opportunities within our communities.

# Growing our impact:

## At a glance

### Partnering for Lasting Financial Strength

**\$16.8 billion**

in assets under care in 529 education savings plans; No. 1 in the industry, based on new investments, and No. 2 in the industry based on assets under care (as of Dec. 31, 2022)<sup>1</sup>

**Nearly \$535 million**

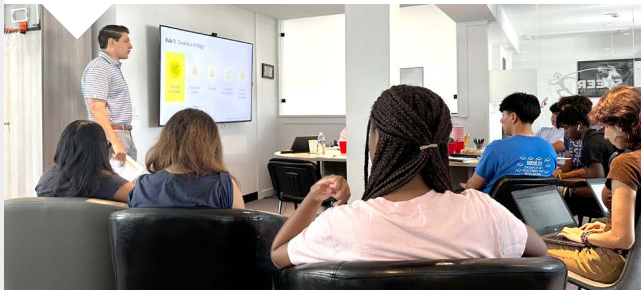
invested by clients in the Edward Jones Charitable Gift Fund since inception, with more than \$90 million granted to charities in 2023

**>848,000 learners**

reached in person and online through Edward Jones Financial Fitness educational programs — including more than 206,000 high school students — since the program began in 2020

**\$25.4 billion**

contributed to gross domestic product (GDP) in U.S. and Canada



### Promoting Healthier Futures

**Approximately \$242,000**

in disaster relief distributed to more than 40 associates and families from associate, retiree and Edward Jones Foundation contributions

**36,250 trees planted**

with the Arbor Day Foundation since 2022

**\$45 million**

contributed to the Alzheimer's Association since 2016



### Advancing Inclusive Growth

**23.1%**

of our financial advisors are women, progress toward our diverse representation goals

**12**

Business Resource Groups — firm-sponsored, associate-led affinity groups that contribute to DEI objectives in key areas

**>\$46 million**

contributed through corporate, Edward Jones Foundation and associate philanthropic support to over 5,000 organizations

**9.6%**

of our financial advisors are people of color, progress toward our diverse representation goals

<sup>1</sup>As ranked by ISS Market Intelligence for Financial Advisor sold 529 plans.