Investments & Services

At Edward Jones, we work with you to understand why you're investing and your financial priorities. You'll experience the convenience of working with one dedicated financial advisor, utilizing an established process to create personalized financial strategies, backed by advice, tools and resources to help you reach your goals. And, we'll continue to partner together to help your strategy stay on track. To that end, we offer a comprehensive line of financial solutions and services in addition to the traditional investments you expect from a financial advisor.

Retirement & College Savings

- Retirement Accounts
  - Traditional IRA
  - Roth IRA
- Education Savings Accounts
  - 529 College Savings Plans
  - Custodial Accounts
- Brokerage Accounts
- Edward Jones Advisory Solutions®

Business Owners

- Plans for You
  - SEP IRA Plan
  - Owner-only 401(k) Plan
  - Owner-only Defined Benefit Plan
- Plans for Your Employees
  - 401(k) Plans for Your Employees
  - SIMPLE IRA
  - 403(b) Plans
  - 457 Plans
  - Safe Harbor 401(k)
- Business Credit Cards

Wealth Management

- Edward Jones Guided Solutions®
- Edward Jones Advisory Solutions®
- Trust Company
- Client Consultation Group

Investments

- Stocks
- Bonds and Fixed Income
- Mutual Funds
- Exchange-traded Funds (ETFs)
- Fixed Income Unit Investment Trusts (UITs)

Insurance

- Life Insurance
- Long-term Care Insurance
- Long-term Disability Insurance

Annuities

- Fixed Annuities
- Income Annuities
- Variable Annuities

Cash & Credit

- Credit Cards & Loans
  - Personal Line of Credit (Margin Loan)
  - Personal Credit Cards
  - Debit Cards
  - Business Credit Cards
- Savings Accounts
- Check Writing

Convenient Account Features

- Direct Deposit
- Dividend and Income Reinvestment
- Electronic Funds Transfer
- Mobile Check Deposit
- Monthly Investing Program
- Online Access

Important information concerning the investments and services offered at Edward Jones can be found at edwardjones.com/investments-services.

To learn more, call today.

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Financial Advisor

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