What's most important to you?

Planning for a comfortable retirement
What does retirement look like for you? What steps have you taken to save so far?

Enjoying retirement
What will it take to make your money last while living the retirement you want?

Preparing for the unexpected
What strategies have you put in place or do you need to protect your family and your savings if something unexpected happens?

Paying for education
Do you know the options you have to save for your child's or grandchild's education?

Saving money on taxes
Do you want more information on how tax-deferred and tax-advantaged investments could play a part in your portfolio?

An established process to help you reach your goals

Throughout our relationship, we'll use our 5-step Process to work together toward building your future and achieving your goals. Let's take a closer look at this process:

Step 1: Where am I today?
To know where you're going, we need to understand what's important to you. Each time we meet, we'll discuss your needs and your overall financial picture.

Step 2: Where would I like to be?
After we understand more about where you are today, we'll translate your needs into specific, measurable goals, so we can better track your progress over time.

Step 3: Can I get there?
Together, we'll analyze your current situation and craft potential solutions and strategies to help you move toward your goals. If you want, we can involve your tax and legal professionals.

Step 4: How do I get there?
Based on the first three steps, we'll find investments, protection and services that can help you move toward where you want to be.

Step 5: How can I stay on track?
We'll meet regularly with you and check in about questions you have or changes in your life. This helps us determine whether we need to make any adjustments to your strategy to keep you moving forward.

Partner with a financial advisor who:

- Takes the time to understand what's important to you
- Uses an established process to build personalized strategies to help meet your goals
- Partners with you over time to make adjustments and help you stay on track

At Edward Jones, we see a future in which more people have the opportunity to reach their goals and have a greater impact on those around them. And we believe it all starts with the relationships you build today.

For more information about why it makes sense to work with Edward Jones to work toward your long-term financial goals, call today.

Edward Jones, its employees and financial advisors cannot provide tax or legal advice. You should consult your attorney or qualified tax advisor regarding your situation.

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Edward Jones

Sensible investing

Are your financial goals within reach?

At Edward Jones, we take the time to get to know you to help bring you closer to the future you see for yourself. How we help turn your vision into a reality is unique to you. We're here to back you up with big ideas, practical strategies and side-by-side guidance at every step.