

Key Steps Toward Achieving Your Financial Goals

Throughout our partnership, we'll use the Edward Jones 5-step Process to establish and regularly confirm your financial foundation by:

- Creating specific financial goals based on what's important to you
- Assessing how comfortable you are with taking risk
- Recommending tailored solutions, aligned with your comfort for risk, to help you achieve those goals



STEP 1 WHERE AM I TODAY?

We want to understand what's important to you. Each time we meet, we'll discuss your needs and current financial picture.

STEP 2 WHERE WOULD I LIKE TO BE?

By translating your needs into specific, measurable goals, we can easily track your progress over time. These goals may be related to:

- Saving for retirement
- Living comfortably in retirement
- Funding a child's education
- Helping support other family members
- Funding a vacation or second home
- Having appropriate insurance to help protect your financial goals

STEP 3 CAN I GET THERE?

We review your current situation and consider potential solutions and strategies together. If you wish, we may involve your tax and legal professionals.

STEP 4 HOW DO I GET THERE?

You have choices in how we can work together. Based on your priorities and preferences, you can select the account options and mix of investments and services that can help you achieve your goals – and protect them.

STEP 5 HOW CAN I STAY ON TRACK?

Meeting annually can help ensure that you stay on track. If any of your goals or circumstances have changed, we can make appropriate updates that address your evolving needs.

Let's discuss your answers to these five key questions.
Doing so can help you work toward your financial goals.



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