

Investments & Services

At Edward Jones, we want to understand what's important to you. Using an established process and dedicated resources, your advisor will help you build personalized strategies to help you achieve your goals. By offering financial solutions specifically designed to help you meet your goals and by meeting regularly, your advisor will partner with you throughout your life to keep you on track.

Annuities¹

Fixed
Life
Term Certain
Variable (Segregated Funds)

Cash Management

Fully Secured Line of Credit
Premium Interest Accounts (PIAs)
Online Money Transfer Service
Mortgage Referral Service²

Client Consultation Team

Complex Needs Analysis
Comprehensive Financial Strategies
Business Owner Concerns
Estate Considerations

Company Retirement Plans

Defined Contribution Registered Pension Plans
Deferred Profit Sharing Plans (DPSPs)
Group Registered Retirement Savings Plans (Group RRSPs)
Individual Pension Plans (IPPs)

Equity Investments

Common Stocks (Canadian & U.S.)
Preferred Stocks

Equity Research

Financial Calculators

Education Savings
Insurance Needs
Retirement

Fixed-income Investments

Bonds

- Corporate
- Government
- Provincial
- U.S. Dollar
- Zero Coupon

Guaranteed Investment Certificates (GICs)
Treasury Bills (T-Bills)

In-trust Accounts

Individual Plans

Life Income Funds (LIFs)
Locked-in Retirement Accounts (LIRAs)
Locked-in Retirement Income Funds (LRIFs)
Locked-in Retirement Savings Plans (LRSPs)
Prescribed Retirement Income Funds (PRIFs)
Registered Retirement Income Funds (RRIFs)
Registered Retirement Savings Plans (RRSPs)
Spousal RRIFs
Spousal RRSPs
Tax-Free Savings Accounts (TFSA's)

Insurance¹

Buy-sell Funding
Collateral Loan
Critical Illness
Disability
Key-person
Long-term Care
Term Life
Universal Life
Whole Life

Insurance Specialists

Investor Education Programs

Investment Programs

Edward Jones Guided Portfolios®
Edward Jones Portfolio Program®

Mutual Funds

Online Access

Portfolio and Retirement Plan Reviews

Pre-Authorized Chequing Plans (PACs)

Registered Disability Savings Plans (RDSPs)

Registered Education Savings Plans (RESPs)

Systematic Investing

Dividend and Income Reinvestment
Monthly Investing Programs

See other side for important disclosures.



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Edward Jones®

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Edward Jones Guided Portfolios® is a fee-based account. Please review the applicable Edward Jones Guided Portfolios Agreement for more information. Many of the investments in Guided Portfolios are offered by prospectus. You should consider the investment objectives, risks, and charges and expenses carefully before investing. The prospectus contains this and other important information. Where applicable, your Edward Jones advisor can provide a prospectus, which you should read carefully before investing.

The Edward Jones Portfolio Program® is a comprehensive managed investment program that combines personal investment strategy driven by the advisor and professional portfolio management driven by a global asset manager SEI.

Commissions, trailing commissions, management fees and expenses all may be associated with mutual fund investments and the use of an asset allocation service, such as the Edward Jones Portfolio Program® (the "Program"). SEI Investments Canada Company ("SEI") is the Manager of the Program. Before investing, please read the prospectus of the mutual fund in which an investment may be made under the Program. Mutual funds are not guaranteed, their values change frequently, and past performance may not be repeated. For more information about SEI and the SEI family of mutual funds, visit www.sei.com. The underlying funds and their weightings in each portfolio are subject to change from time to time at the Manager's discretion. The portfolio managers or the allocations of assets to a particular portfolio manager are subject to change from time to time at the Manager's discretion.

Your personal Line of Credit is a margin account. Borrowing against securities involves greater risks than using cash resources only and is not appropriate for everyone. Your responsibility to repay the loan and interest continues, even if the value of the securities declines. If the value of your securities declines, you may be required to deposit funds, additional securities, or sell the securities in your account to meet the margin call. Interest begins to accrue from the date funds are borrowed and is charged to the account. Rates are subject to change without notice. Available only for certain account types and subject to approval.

- 1 Insurance and annuities are offered by Edward Jones Insurance Agency (except in Quebec). In Quebec, insurance and annuities are offered by Edward Jones Insurance Agency (Quebec) Inc.
- 2 Mortgages are offered through Manulife Bank of Canada and Manulife Trust Company.

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Member - Canadian Investor Protection Fund

Edward Jones®