

What every business owner needs

As a business owner, you have many things to consider beyond your daily responsibilities. While you have many priorities, we have one. Our sole focus is to understand and help you achieve what's most important to you — and your business.

How we help you reach your personal and business financial goals



We'll work together with your tax and legal professionals through an established process to build personalized strategies for you — including specific actions — to help you reach your personal and business financial goals. Over time, we'll continue to revisit these goals, your comfort with risk and the strategies we've developed to help keep you on track.

Where personal and business needs meet

Few things are more rewarding — or challenging — than owning your own business. And because it's become an integral part of your life, you'll need a comprehensive financial strategy for your future, your business and your family.

Your business

Having the appropriate investment and protection strategies is a critical step in helping you reach your goals.

Your family

Establishing a strategy can help you and your family save for multiple goals — such as retirement and education — and prepare for the unexpected.

Your employees

Offering a retirement plan can help attract and retain quality employees and may provide tax advantages.

Your exit strategy

Developing strategies is important so you can protect the value of your business, help retain key employees and provide for an orderly transition when you leave.

Edward Jones, its employees and financial advisors are not estate planners and cannot provide tax or legal advice. Please consult your estate-planning attorney or qualified tax advisor regarding your situation.

Important information concerning the investments and services offered at Edward Jones can be found at [edwardjones.com/investments-services](https://www.edwardjones.com/investments-services).



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Edward Jones serves more than 8 million investors, and we're committed to supporting our clients in the local communities where we live and work. We also support more than 250,000 employers like you, from local businesses and professional practices to national companies with numerous locations.

Investments

- Annuities
- Certificates of deposit
- Equity investments
- Fixed-income investments
- Insurance
 - Disability
 - Key Person
 - Life
- Mutual funds

Retirement

- Business retirement plans
 - 401(k)s
 - Defined benefit
 - Cash balance
 - Profit-sharing
 - Money purchase
 - SEP plan
 - SIMPLE IRAs
- Individual retirement accounts
 - Roth IRAs
 - Traditional IRAs

Services

- Check writing and debit cards
- Personal and business credit cards
- Edward Jones Advisory Solutions®
- Edward Jones Guided Solutions®
- Employee education programs
- Estate consideration and trust services
- Online Access and e-delivery
- Personal and reserve lines of credit