Develop Your Strategy

- It’s All About You
- Balance Your Goals
Understand Risk

• Risk is More Than the Ups and Downs of the Market
• How Much Risk Makes Sense?
• Address the Most Important Risk
Diversify for a Solid Foundation

• The Benefits of Diversification
• It’s the Mix That Matters
• Deeper Diversification with Asset Classes
RULE 4

Stick with Quality

• What Is Quality?
• Fads vs. Fundamentals
• Don’t Reach for Yield
Invest for the Long Term

• Time in the Market, Not Timing the Market
• Buy and Hold Doesn’t Mean Buy and Forget
RULE 6

Have Realistic Expectations

• What Return Do I Need?
• Achieve Your Expectations
Maintain Your Balance

- Are You Out of Alignment?
- The Benefits of Rebalancing
Prepare for the Unexpected

- Start with the Basics
- Address Risks Throughout Your Life
Focus On What You Can Control

- Time-tested Principles, Not Predictions
- Don’t Let Emotions Drive Decisions
- Focus On Your Strategy
Review Your Strategy Regularly

• Stay On Course
• More Than Just Your Investments
• Your Annual Checkup
Rule 1: "Develop Your Strategy"
Rule 2: "Understand Risk"
Rule 3: "Diversify for a Solid Foundation"
Rule 4: "Stick with Quality"
Rule 5: "Invest for the Long Term"
Rule 6: "Have Realistic Expectations"
Rule 7: "Maintain Your Balance"
Rule 8: "Prepare for the Unexpected"
Rule 9: "Focus On What You Can Control"
Rule 10: "Review Your Strategy Regularly"
Thank You

Please Complete Your Evaluation Now
Important Considerations

Diversification does not guarantee a profit or protect against loss.

Past performance is not a guarantee of future results.

Investment-grade bonds are those rated BBB/Baa and above by Standard & Poor’s and Moody’s. A bond represents a loan that an investor makes to an issuer in which the issuer agrees to pay the owner the amount of the face value of the bond at a future date, and to pay interest at a specified rate at regular intervals. Bonds are subject to yield and market value fluctuation. If a bond is sold prior to maturity, the amount received from the sale may be less than the amount originally invested. Bond values may decline in a rising interest rate environment.

Dividends can be increased, decreased or eliminated at any point without notice. Investors should understand the risks involved of owning investments, including interest rate risk, credit risk and market risk. The value of investments fluctuates and investors can lose some or all of their principal.

Special risks are inherent to international investing, including those related to currency fluctuations and foreign political and economic events.

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Before investing, you must evaluate your investment objectives, risk tolerance and financial circumstances.