

Ready or Not?

Preparing for
the Unexpected



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Edward Jones[®]
MAKING SENSE OF INVESTING



Introducing The Williams Family



Preparedness Quiz



1

I have a fire
extinguisher
in my kitchen.

True or False?

2

I know where the
tire jack is for my
spare tire.

True or False?

3

I have checked my
smoke alarms in the
last six months.

True or False?

4

I can find my stocked first-aid kit in under a minute

True or False?

5

I have an emergency preparedness kit *and* have checked it in the last year.

True or False?



Do You Feel **Prepared?**



Working Together



Your strategy isn't complete
unless you've prepared for the
unexpected.



Addressing Foundational Financial Risks



Emergency Fund



Line of Credit

Our Personal Line of Credit is a margin loan and is available only on certain types of accounts. Investing on margin or using a margin loan involves risk and is not appropriate for everyone. You can lose more funds than you deposit in the margin account. If the value of the securities in your margin account decline, you may be required to deposit cash or additional securities. In the event of a margin call, the firm can sell securities or other assets in your accounts and can do so without notice to you. You may not be entitled to choose which securities or other assets in your accounts are liquidated or sold to meet a margin call. The firm can increase its maintenance margin requirements at any time and/or not grant an extension of time on a margin call. Interest will begin to accrue from the date of the loan and be charged to the account.

A photograph of a group of people, including an older man and a younger woman, smiling and eating at a table. In the foreground, there is a bamboo steamer basket filled with bread. The background is slightly blurred, showing a red wall and a window.

Homeowners/Renters Coverage

Edward Jones does not offer homeowner's insurance or renter's insurance.



Investments



Medical Expenses

Providing for Your Family's Future

- Early or midcareer
- Caring for children or aging parents
- Paying a mortgage or other loans
- Saving for retirement
- Planning to pay for a child's education



Life and Disability Insurance



Family Resources



Review

Preparing for the Unexpected

- Detail your current financial situation
- Fortify your emergency fund
- Consider a line of credit
- Review your asset/liability protection and insurance policies

Preparing for the Unexpected

- Address investment risk
- Review your medical expense coverage
- Consider life and disability insurance options
- Take proactive action
- Review

Preparing for the Unexpected






Questions & Answers

Thank You

Please complete your evaluation now.

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