

THE POWER OF PARTNERSHIP

The not-so-secret reason behind **Edward Jones'** success in building trusted client relationships? Its unique, personalized—and partnered—approach to investing.

BACK IN 2003, FINANCIAL ADVISOR DAVID TAM was drawn to St. Louis–based investment firm Edward Jones because of its unique branch team business model, a structure consisting of a financial advisor and a branch office administrator working in tandem. Senior branch office administrator Sarah Karpicus joined his office in San Diego about a year later, and the two have worked together ever since.

This personalized approach to investing allows the branch team to build trusted relationships with their clients, while delivering superior value. It's a model that doesn't exist at other financial institutions—and it's not only clients who benefit from it.

"Being a part of a branch team was unique for me as a new financial advisor just starting out," Tam says. "But I figured if the firm was willing to invest in rookies, it would probably treat its veterans pretty well. Two decades later, I haven't looked back."

Today, Tam and Karpicus's branch ranks in the top 3% of the firm. As the branch has evolved, Karpicus says her role has evolved too. She handles everything from supporting business strategy and operations to facilitating hospitality and event planning. Karpicus has also benefited from another aspect of this one-of-a

kind model: becoming a limited partner at Edward Jones by purchasing a small equity share in the firm. "I get to be a partner in the work and success of the firm," she says. "It creates a spirit of community."

Collaboration is a hallmark of the firm's culture, and both Tam and Karpicus believe their long-term,



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FINANCIAL ADVISOR
EDWARD JONES

team-based approach has allowed them to better serve clients and build deep, lasting relationships over time. Typically, Tam works on clients' big-picture financial goals, while Karpicus helps with carrying out the administrative aspects of their strategies, such as transferring an account or dealing with estate issues.

Often that requires calling other financial institutions on their clients' behalf. Karpicus has seen first-hand how impersonal that type of interaction can be, which has made her appreciate the high-touch service that the Edward Jones model offers.

"Clients know that if they call our branch, they're going to get one of us. They know our names; they know what we did over the summer," she says. "We are real people to them, and we have a personal relationship."

That human touch and the deep trust it engenders allow Edward Jones financial advisors not only to help clients reach their financial goals but also to become a meaningful part of their lives and communities. From meeting new babies to attending weddings, Tam has witnessed many of his clients' major life milestones.

"I'm fortunate to create long-term relationships with our clients," Karpicus says. "It feels like an extended family." ■

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SARAH KARPICUS
SENIOR BRANCH
OFFICE ADMINISTRATOR
EDWARD JONES



Bruce Biedar, CFP®
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