



Evidence of Excellence

"The evidence never lies" is a common catchphrase of Gil Grissom, the lead character in the popular CSI television show. This also proves true in the case of two Indiana companies in which the findings are convincingly conclusive:

Their employees love where they work!

By Rebecca Patrick

Edward Jones

Exhibit 1: For the second year in a row, Edward Jones – the nation's largest investment firm – finished first in Indiana's Best Places to Work program among large employers.

Exhibit 2: At Edward Jones, employees are actual partners in the company and share in its profits.

Exhibit 3: As long as profitability is met, individual branches have the flexibility to run their offices in the manner that works best for them.

Exhibit 4: The Edward Jones way, instilled from the corporate office in St. Louis, is a national model for employer and employee satisfaction. Besides Indiana, the firm has recently garnered top Best Place to Work honors in six other states: Colorado, Hawaii, Illinois, Kentucky, Ohio and Oklahoma, as well as made *Fortune Magazine's* "100 Best Companies to Work For" list.

The most persuasive evidence, though, comes from those on the scene – the employees at the 357 branch offices in Indiana.

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Schmidt Associates

"Everyone is so willing to share and help you to grow and help you to become whoever you want to be. That's fantastic! I love what I do and every morning I wake up and am excited to come to work. Every day, I know there's a new challenge, there's something new and fun to do, fun to learn, people to talk to, people to meet. It's just been great!" – Desma Belsaas, graduate architect

Testimony like this affirms Wayne Schmidt's conviction in starting an architectural firm nearly 31 years ago. He wanted to be in downtown Indianapolis for its vitality and to foster an environment for quality service and professional development. He accomplished both.

Today, Schmidt Associates is home to 95 employees. Throughout the company's evolution, Schmidt has pledged to his staff to: meet payroll, obtain the "right" projects, allow you to do good work, provide for career growth, act with integrity and be intentional with the future.

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Edward Jones

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Jim Paine, financial advisor, West Lafayette
21 years with company

Caring and communication set tempo

"Philosophically we operate by the Golden Rule. We treat each other very well and, in turn, are able to treat our clients in the same way."

"It's really amazing because here we are with 9,000-plus offices (nationwide), and we operate pretty much by ourselves – myself and my assistant – and that's the way every office operates. Even though we're spread out all over the country in all these little tiny offices, the communications are excellent. The attitudes are excellent. In exchanges back and forth with headquarters (in St. Louis), it's amazingly well run."

Tonya Binney, branch office assistant, Newburgh
7 months with company

Single parent now less stressed

"My husband died eight years ago and I'm raising my 10-year-old son on my own. The one thing that has stuck with me is my first day when I had to call in and say, 'My child is sick, I'm sorry I have to stay home with him today because there's nobody else to take care of him.' The financial advisor said, 'OK, let me know when you'll be back.' And that was it. There was no guilt, and there were no phone calls later in the day. An on-call assistant came in, and when I came in two days later, there wasn't a pile of work sitting there waiting on me. ... It was quite a shock, and a pleasant one!" (Note: Edward Jones has on-call assistants available in each local area.)

"My son has mentioned a couple of times that I am not as stressed and not as tense – and 'Mommy's just much happier now.' He's noticed a difference in me and to me that means all the difference in the world."

Craig Tidball, financial advisor, Warsaw
28 years with company

Company delivered big during medical crisis

"I've had some medical setbacks and been out of the office for extended periods three times for cancer treatments. One of them was a bone marrow transplant. The company just stepped in and said, 'Craig, we value you as an employee, we want to do whatever we need to make sure you and your family are whole again. We're going to get someone to fill in for you and we'll help cover your expenses.' All the business side was taken care of for me so that I could focus on my health. One of the early times, we were in a situation where my treatment was going to be experimental and the insurance company would not pay for it. Edwards Jones (corporate office) stepped in and paid over \$100,000 for my care. That kind of sealed my pact with the company forever. I remember being at home and getting a phone call from the president of the company saying, 'Craig, we're going to pay that bill for you.' I still tear up now just talking about it."

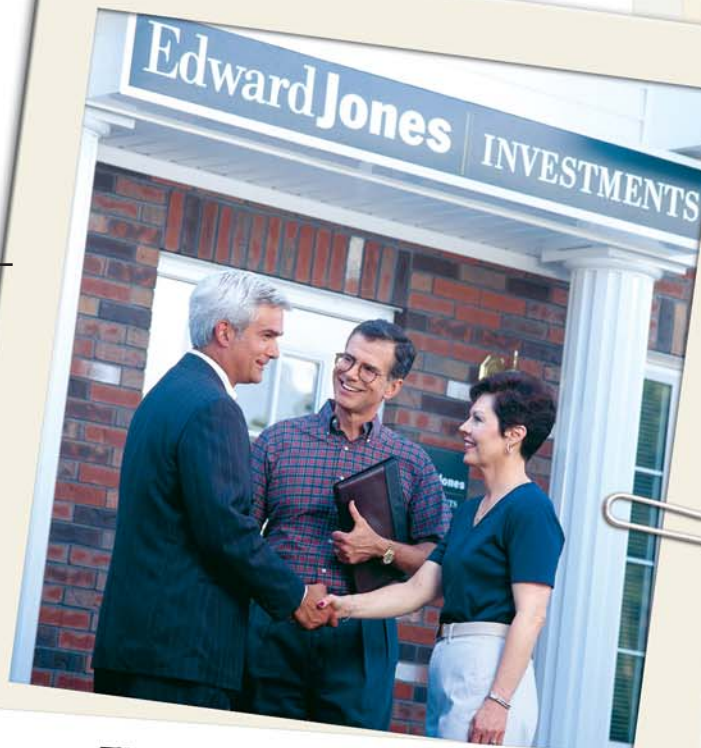
Edward Jones®

MAKING SENSE OF INVESTING

EDWARD JONES



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Edward Jones

Camaraderie second to none

“With other brokerage firms when you come in – besides competing with people in other businesses that are going after your clients – you’re also competing with the guy sitting next to you because he’s also going after your clients. At Edward Jones, we are set up so that we’re all kind of in this together. So the guy that sits next to me or my partner here in town, he and I respect each other’s clients. ... We just all work together for the common good here. It lets everybody be successful and lets us knit together closely as a team. That’s just another part of that culture that passes on down through the system.”

Connie Curtis, financial advisor, Bloomington
3 years with company

Freedom to make your own way

“The best thing is the level of independence and that you can establish your work schedule. The company gives you the tools to be successful, and then it’s up to you how you choose to use them within certain guidelines of being profitable and ethical. Still, you do have that flexibility of being able to determine what your hours are and what kind of promotions you’ll do, what kind of products you might be promoting.”

Heather Carter, branch office assistant, New Castle
7 years with company

Go to college on the firm

“We have tuition reimbursement. They’ll pay for basically everything but your parking permit. I think I’ve taken 26 credits and they’ve paid for all of it. And we have locations all over the country, so if I ever decide I want to go anywhere else, I can pretty much go anywhere I want. We have the support of the home office, and we have the potential for advancement.”

Environment puts you on right track for retirement

“The (fiscal) knowledge that I have learned while working here is amazing. I started here at 26 and had a very small 401(k) from where I had worked before to roll over. There’s absolutely no way that I would have the money invested (that I do), the path I have created for retirement, if I had not come here to work. When I came here, I didn’t know anything about financial investing, nothing. What I have learned personally has benefited me so much in my own financial situation that it’s been such an enormous benefit. I now understand what I need to do to be able to retire early – things that just would have never clicked for me had I not worked here.”

Chuck Harris, financial advisor, Huntington
19 years with company

Partnership mentality breeds contentment

“At Jones, we don’t want the employee mentality. Employees are hard to work with; we want partners. And what I love about this is that I’m a partner in the firm but my office staff members are partners also. Down the line it’s not like, ‘Okay, you’re a partner, you’re a partner, you’re a partner, but you’re excluded.’ They are very inclusive in how they run the company. We want people who think like owners. If you make people owners, they look at life a lot differently. To me, it’s like everybody has different levels of participation in the ownership, but we’re all still owners of the firm.”



The company’s caring ways extend to clients and foster great camaraderie in and among the branch offices.



Heather Carter can better plan for the future thanks to Edward Jones’ employee offerings.