

## Accessing Your Tax Forms Made Easier

You may view, print and download your Edward Jones tax information anytime through Online Account Access. There's no need to print and fax multiple pages of your Edward Jones tax forms because you may securely share them electronically with your tax professional through Online Account Access. All Forms 1099 will be issued to clients by Feb. 15.

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ANITA KAY BRUNSTING TTEE                    \$\$SEQ\$\$  
U/A DTD 10/10/1996  
ELMER H BRUNSTING DECEDENTS TR  
203 BLOOMINGDALE CIRCLE  
VICTORIA TX 77904-3049

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### Your Edward Jones financial advisor

DOUG WILLIAMS

860-659-8145

888-659-9931

36 WELLES STREET

GLASTONBURY CT 06033

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### Other contact information:

[www.edwardjones.com/access](http://www.edwardjones.com/access)

Edward Jones

Attention: Client Reporting

201 Progress Parkway

Maryland Heights, MO 63043

Edward Jones Personal MasterCard@ 866-874-6711

Edward Jones Business MasterCard@ 866-874-6712

Client Relations: 800-441-2357

Edward Jones VISA debit card: 888-289-6635

Monday-Friday 7am-7pm Central time



Account number: 609-91956-1-9  
Statement type: Preferred  
January 1 - January 30, 2015

201 Progress Parkway  
Maryland Heights, MO 63043-3042  
www.edwardjones.com  
Member SIPC



EDWARD D JONES & CO CUSTODIAN  
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203 BLOOMINGDALE CIRCLE  
VICTORIA TX 77904-3049

DOUG WILLIAMS  
36 WELLES STREET  
GLASTONBURY CT 06033  
860-659-8145  
888-659-9931

#### Value Summary

<b>Value on Jan 30</b>	<b>\$493.82</b>
Value on Jan 1	\$527.80
Value one year ago	\$603.84

#### Summary of Your Assets

Held at Edward Jones	Value on Jan 30	Value on Jan 1	Dollar change
Cash, Insured Bank Deposit & Money Market funds	\$242.52	\$242.52	\$0.00
Stocks	251.30	285.28	-33.98
<b>Total at Edward Jones</b>	<b>\$493.82</b>	\$527.80	-\$33.98

#### Retirement Fee Notice

Amount due for account 609-91956-1-9 \$40.00

**Due Date** February 20, 2015

To learn more about the various payment methods available to you, contact your Financial Advisor.



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### Your Retirement Account Summary

	This period	Cumulative
2015 Contributions	\$0.00	\$0.00
2014 Contributions	\$0.00	\$0.00

### Looking for Help This Tax Season?

If you have questions regarding your Edward Jones tax forms, we can help. Visit [www.edwardjones.com/taxcenter](http://www.edwardjones.com/taxcenter) for updates and answers to frequently asked questions. For information regarding your Edward Jones account or to access your tax forms electronically, visit [www.edwardjones.com/access](http://www.edwardjones.com/access). Edward Jones, its employees and financial advisors cannot provide tax advice. Consult your qualified tax advisor regarding your situation.

### Your Assets at Edward Jones

Cash, Insured Bank Deposit & Money Market funds	Current Yield/Rate	Current value
Cash		\$242.52
<b>Total Cash, Insured Bank Deposit &amp; Money Market funds</b>		<b>\$242.52</b>

Stocks	Asset Category/ Research Opinion	Current price	Current shares	Current value	Amt. invested since inception	Amt. withdrawn since inception
GENERAL MOTORS CO WARRANT EXPIRES 07/10/2019 Symbol: GM WSB	Aggressive None	15.500	1.	\$15.50	~	~
GENERAL MOTORS CO WARRANTS EXPIRES 07/10/2016 Symbol: GM WSA	Aggressive None	22.960	1.	22.96	~	~
GENERAL MOTORS COMPANY NEW Symbol: GM	Aggressive Hold	32.620	2.	65.24	~	~
MOTORS LIQUIDATION COMPANY GUC TRUST UNIT BENEFICIAL INTEREST Symbol: MTLQU	Aggressive None	16.400	9.	147.60	~	~



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Preferred Stocks	Asset Category/ Research Opinion	Current price	Current shares	Current value	Amt. invested since inception	Amt. withdrawn since inception
GENERAL MOTORS ESCROW CUSIP Symbol: 370ESC75	Aggressive None	~	389.	~	~	~
<b>Total Stocks</b>				<b>\$251.30</b>	~	~

The Edward Jones' Research Opinion referenced in this document does not take into account your particular investment profile and is not intended as an express recommendation to purchase, hold or sell particular securities, financial instruments or strategies. You should contact your Edward Jones Financial Advisor before acting upon the Edward Jones Research Opinion referenced in this report.

**Total estimated asset value** **\$493.82**

#### Is Your Beneficiary Information Accurate?

When was the last time you reviewed the beneficiaries on your accounts? If it's been awhile, Valentine's Day may serve as a good reminder to do so. Making sure your beneficiary information is accurate and up-to-date, and that you've named both primary and contingent beneficiaries, will help ensure your assets are distributed in the manner you want and to those who matter most to you. Your local Edward Jones team can help you with this process.



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## **Paying for Education: A Strategy That Makes the Grade**

You play an important role in your child's or grandchild's development, which can include helping to pay for his or her education. The process for creating a strategy to pay for education has three major parts:

### **1. Plan for the Expected**

The process starts with understanding your vision for your child's or grandchild's education. We can help you understand the potential costs, benefits and considerations, which can then help you determine your role in paying for education.

You and your financial advisor can determine how much you need to save each month to help get you there. Time is one of your biggest assets. Delaying even a few years can have a big effect on your portfolio's value.

### **2. Prepare for the Unexpected**

Life can be unpredictable, so it's important to address the possibility of unforeseen financial challenges. Prepare for the rising cost of education by automatically increasing your savings rate each year. Life and disability insurance can help protect your education plan in case of disability or premature death. And building an emergency cash balance of three to six months' worth of living expenses can protect you from unexpected events.

### **3. Position Your Portfolio for Both**

It's important to select the type of account that makes sense for your situation. Each account has varying contribution limits and rules and different tax treatments. Your financial advisor can help you select the type of account that makes sense for your situation.

Between kindergarten and college, lots of things can change – education costs, investment performance, your child's or grandchild's college choices, financial aid options and even the number of children or grandchildren you're providing for. That's why it's important to regularly discuss your education savings strategy with your financial advisor and make adjustments to ensure your strategy stays on track.

Visit [www.edwardjones.com/payingforeducation](http://www.edwardjones.com/payingforeducation) to read the entire "Paying for Education: A Strategy That Makes the Grade" report.



**About Edward Jones**

Edward D. Jones & Co., L.P. is dually registered with the Securities and Exchange Commission (SEC) as a broker-dealer and an investment adviser. Edward Jones is also a member of FINRA.

**Statement of Financial Condition** – Edward Jones' statement of financial condition is available for your personal review:

- \* at your local branch office
- \* at [www.edwardjones.com/en\\_US/company/index.html](http://www.edwardjones.com/en_US/company/index.html)
- \* by mail upon written request

**About Your Account**

**Account Information** – Your Account Agreement contains the complete conditions that govern your account. Please contact your financial advisor if you have any changes to your financial situation, contact information or investment objectives.

**Account Safety** – Please review your statement carefully. If you believe there are errors on your account, you must notify us promptly of your concerns. You may either contact our Client Relations department or your financial advisor. You should re-confirm any oral communication by sending us a letter within 30 days to protect your rights, including your rights under the Securities Investor Protection Act (SIPA).

**Errors or Questions about your Electronic Transfers** – Contact Client Relations at (800) 441-2357.

**Complaints about Your Account** – If you have a complaint please call (800) 441-2357 or send a letter to Edward Jones, Attn: Complaints Dept., 1245 JJ Kelley Memorial Dr., St. Louis, MO 63131

**Withholding on Distributions or Withdrawals** – Federal law requires Edward Jones to withhold income tax on distribution(s) from your retirement accounts and other plans unless you elect not to have withholding apply. You may elect a percentage to be withheld from your distribution or not to have the withholding apply by signing and dating the appropriate form and returning it to the address specified on the form. Your election will remain in effect until you change or revoke it by returning another signed and dated form. If you do not return the form by the date your distributions are scheduled to begin, Federal income tax will be withheld. If you do not have enough income tax withheld from your distributions, you may need to pay estimated tax. You may incur penalties if the amounts withheld and your estimated tax payments are not equal to the tax you owe. State withholding, if applicable, is subject to the state's withholding requirements.

**Fees and Charges** – The "Fees and charges" amount shown in your Summary of Your Investment Activity includes all activity fees, except dividend reinvestment fees.

**Fair Market Value for Individual Retirement Accounts** – Your fair market value as of December 31st will be reported to the IRS as required by law.

**Rights to Your Money Market Fund, Bank Deposit and Free Credit Balances** – Your free credit balances are payable on demand. You may require us to liquidate your bank deposit or money market fund balance. We will then disburse the proceeds to you or place them in your securities account. Your instructions must be made during normal business hours and are subject to terms and conditions of the Account Agreement.

**Important disclosures and other information relating to your account(s) are available at** [www.edwardjones.com/disclosures](http://www.edwardjones.com/disclosures).

**Go Green! Did you know you can receive your statements and other documents online instead of on paper?  
Visit [www.edwardjones.com/edelivery](http://www.edwardjones.com/edelivery) for more information.**

