

# 2021 U.S. Branch Office Administrator (BOA) Full-Time Benefits

Edward Jones is based on a legacy of partnership, and as a privately held firm, we share our success with our associates through a variety of variable compensation programs based on market conditions and associate performance.

## FINANCIAL SECURITY

### BONUS OPPORTUNITIES

- **BOA - Trainee Milestone:** BOA Trainees are eligible for a six-month milestone bonus based on their milestone review rating completed by the Financial Advisor.
- **Branch Profitability Bonus:** Eligible when employed the day before the trimester begins and at the time of distribution.
  - » Based on branch profitability - Firm matches dollar for dollar up to 10%.
  - » Awarded on a trimesterly basis with distribution at the Financial Advisor's discretion.
- **Trimester Bonus:** Once promoted out of BOA Trainee title, BOAs are eligible provided they are employed for the entire trimester and at the time the bonus is paid.
  - » This program provides a bonus to BOAs based on the firm's Financial Advisor bonus level and the BOA's trimester performance as evaluated by the Financial Advisor and based on the BOA's tenure with the firm.
  - » Distribution: June, October, February.

\* For all bonuses, the associate must work an average of 20 hours a week (320 hours in the trimester) and be employed the entire bonus period, as well as on the bonus pay date.

## RETIREMENT (Profit Sharing & 401(k))

- Both are vested 100% immediately.
- Profit Sharing has averaged more than 4% over the past 10 years.
- Eligible for Profit Sharing contributions on July 1 following your hire date.
- The firm matches up to \$500 per year of your 401(k) contribution.
- Eligible for 401(k) match Jan. 1 following your hire date.

For specific plan details, please refer to the Investing in You website: [www.edwardjonesbenefits.com](http://www.edwardjonesbenefits.com) > Financial Security > Edward Jones Retirement Plan.

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## INSURANCE BENEFITS

### MEDICAL INSURANCE

(must enroll within 31 days of start date)

- On average the firm pays 80% of the premium, assuming full advantage of wellness program discounts.
- The firm provides assistance by complementing this with HSA and FSA options depending on individual eligibility.
  - » If eligible for HSA participation, the firm will match up to \$500 to \$1,000/year based on your plan coverage and HSA contribution.
  - » Eligibility: First day of the month following one full calendar month of employment.
- Provider Network: Anthem Blue Cross.
- Other insurance
- The firm also offers dental insurance, vision insurance, company paid short-term and long-term disability insurance, as well as life insurance.

For specific plan details, please refer to Investing in You at [www.edwardjonesbenefits.com](http://www.edwardjonesbenefits.com) > Well-Being > Medical Plan Overview (See Resources with Medical Rates & Discounts).

## PAID TIME OFF

- 10 vacation days per calendar year with increases at set anniversaries, prorated based on start date.
- Eight sick days per calendar year, prorated based on start date, and can roll over up to a maximum of 90 days. (The number of days awarded may differ based on state or local law)
- One personal day per year (after 90 days of employment).

## PAID HOLIDAYS (Branch closure schedule below)

- |                               |                     |
|-------------------------------|---------------------|
| 1. New Year's Day             | 5. Memorial Day     |
| 2. Martin Luther King Jr. Day | 6. Independence Day |
| 3. President's Day            | 7. Labor Day        |
| 4. Good Friday                | 8. Thanksgiving Day |
|                               | 9. Christmas Day    |

## ADDITIONAL BENEFITS

Tuition Reimbursement Program, Trading Discounts, Adoption Assistance Program, Parental Leave, Bereavement Leave, and Jury Duty Leave. For specific plan details, please refer to the Investing in You website: [www.edwardjonesbenefits.com](http://www.edwardjonesbenefits.com).



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