

# 2020 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 the 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 6-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 bonus is paid.
  - » This bonus program provides a bonus to BOAs based upon the firm's Financial Advisor bonus level and the BOAs trimester performance as evaluated by the Financial Advisor and BOA's tenure with the firm.
  - » Distribution: June, October, February.

\* For all bonuses, 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, pro-rated based on start date.
- Eight sick days per calendar year, pro-rated based on start date, and can roll over up to a maximum of 90 days.
- 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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