

# 2024 U.S. Client Support Associate 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

- **Branch Profitability Bonus:** Eligible when employed during the applicable trimester and at the time of distribution
  - » Awarded on a trimester basis with distribution at the Financial Advisor's discretion
  - » Based on the firm's bonus level and the Financial Advisor's profitability — Firm matches dollar for dollar up to 10%, if the associate is employed the entire trimester
  - » Distribution: June, October, February
- **Trimester Bonus:** After training, associate is eligible provided they are employed the entire trimester and at the time the bonus is paid.
  - » This program provides a discretionary bonus based on the firm's bonus level and the associate's trimester performance as evaluated by the Financial Advisor
  - » Distribution: June, October, February

### 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 hire date
- The firm matches up to \$500 per year of the associate's 401(k) contribution
- Eligible for 401(k) match Jan. 1 following hire date

The 401(k) and profit sharing amount is discretionary. For specific plan details, please refer to the Investing in You website: [edwardjonesbenefits.com](https://edwardjonesbenefits.com) >Financial > Retirement Plan.

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## Insurance benefits

### Medical insurance (must enroll within 31 days of start date)

- The firm pays an estimated 88% of the premium, assuming the associate takes 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 contribute up to \$1,000/year based on the associate's plan coverage and date in the plan
  - » Eligibility: First day of the month following one full calendar month of employment
- Provider Network: Anthem Blue Cross
- 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 [edwardjonesbenefits.com](https://edwardjonesbenefits.com) > Resources > Rates and select U.S. Full-Time Client Support Team for 2024 rates and coverage details.

### Paid time off

- Fifteen 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)
- Two personal days per year (after 90 days of employment).

### Paid holidays (Branch closure schedule below)

- |                               |                     |
|-------------------------------|---------------------|
| 1. New Year's Day             | 6. Juneteenth       |
| 2. Martin Luther King Jr. Day | 7. Independence Day |
| 3. President's Day            | 8. Labor Day        |
| 4. Good Friday                | 9. Thanksgiving Day |
| 5. Memorial Day               | 10. Christmas Day   |

### Additional benefits

Tuition Reimbursement Program, Trading Discounts, Adoption Assistance Program, Parental Leave, Day of Caring, Voluntary Unpaid Personal Leave, Bereavement Leave and Jury Duty Leave.

For specific plan details, please refer to the Investing in You website: [edwardjonesbenefits.com](https://edwardjonesbenefits.com).