

2024 U.S. Part-time Branch Office Administrator (BOA) Benefits

Edward Jones is based on a legacy of partnership, and as a privately held firm, associates share in our success 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 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 BOA is employed for the entire trimester.
 - » Distribution: June, October, February of the following year.
- **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. The associate must work an average of 20 hours a week (320 hours in the trimester).
 - » This program provides a discretionary bonus to BOAs based on the firm's bonus level and the BOA's trimesterly performance as evaluated by the financial advisor and based on the BOA's tenure with the firm.
 - » Distribution: June, October, February of the following year.

Retirement (Profit sharing & 401(k))

- Profit Sharing has averaged more than 4% of eligible earnings over the past 10 years.
- Eligible for profit-sharing contributions on July 1 following the associate's 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 profit sharing and 401(k) match eligibility, associate must work and be compensated for 1,000 hours per calendar year.

Insurance benefits

Medical insurance eligibility

- Must average 30 hours a week + one year of service
- Provider Network: Anthem Blue Cross

For specific plan details, please refer to Investing in You at edwardjonesbenefits.com > Resources > Rates and select U.S. Part-Time Associate for 2024 rates and coverage details.

Trading discounts

- **Mutual funds** — Certain mutual funds may be purchased at net asset value (NAV).



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