

# 2024 Part-time Client Support Associate Benefits (U.S.)

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 for the entire trimester.
  - » Distribution: June, October, February.
- **Trimester bonus:** After training, the associate is eligible provided they are employed for 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 and based on the associate's tenure with the firm.
  - » Distribution: June, October, February.

### Retirement (Profit sharing & 401(k))

- Profit Sharing has averaged more than 4% 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](https://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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