

Edward Jones FAQs

What is a Form 1095-C?

Form 1095-C is a tax form required by the IRS to be provided by Edward Jones to its associates. The form contains detailed information about the health coverage offered to you by Edward Jones and whether or not you enrolled in the Edward Jones Medical Plan for all or part of the 2023 calendar year.

Who receives a Form 1095-C?

Edward Jones is required to send a Form 1095-C to any associate who was eligible for health coverage under the Edward Jones Medical Plan during the 2023 calendar year. Additionally, Edward Jones is required to file copies of the form with the IRS.

Why do I need the Form 1095-C?

Your Form 1095-C will confirm your eligibility and, if applicable, your enrollment in qualified health coverage for all or part of 2023. You may need the Form 1095-C to complete your 2023 tax return. Edward Jones does not provide tax advice. You should consult with a qualified tax professional for advice regarding your personal situation.

What should I do with my Form 1095-C?

Your Form 1095-C should be kept with your tax documents. You may need the Form 1095-C to complete your 2023 tax return. Edward Jones does not provide tax advice. You should consult with a qualified tax professional for advice regarding your personal situation. The form will not need to be sent to the IRS with your tax return filing.

How do I request a duplicate copy of the form?

You may request a duplicate copy of the form after February 29, 2024. Please use the Request for Duplicate IRS Form 1095 found on the Edward Jones benefits website at www.edwardjonesbenefits.com, under Resources to request a copy. We will mail a duplicate form or provide it electronically to your Edward Jones email address. Due to security reasons we will not provide electronic copies to a personal email address. Requests may take up to 5 business days to complete.

NOTE: Duplicate forms will only be released directly to the associate. For privacy reasons, we cannot release the information to spouses, family members, accountants, etc.

What if I have questions or want additional information?

If you have additional questions about your Form 1095 or want additional information, please visit Edward Jones benefits website at www.edwardjonesbenefits.com, under Resources. You may also visit www.irs.gov or www.healthcare.gov to learn more.

You may also contact HRHELP@edwardjones.com, call 1-800-440-3060, 314-515-1006 or ext. 5-1006.

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What is a Form 1095-B?

Form 1095-B is a tax form required by the IRS to be provided by Edward Jones to you. The form contains detailed information about the health coverage offered to you by Edward Jones for all or part of the 2023 calendar year.

Who receives a Form 1095-B?

Any General Partner, Service Partner, or Joint Venture Service Partner who received health coverage from Edward Jones for all or part of the 2023 calendar year will receive a Form 1095-B. Additionally, Edward Jones is required to file copies of the form with the IRS.

Why do I need the Form 1095-B?

Your Form 1095-B will confirm your enrollment in qualified health coverage for all or part of 2023. You may need the Form 1095-B to complete your 2023 tax return. Edward Jones does not provide tax advice. You should consult with a qualified tax professional for advice regarding your personal situation.

What should I do with my Form 1095-B?

Your Form 1095-B should be kept with your tax documents. You may need the Form 1095-B to complete your 2023 tax return. Edward Jones does not provide tax advice. You should consult with a qualified tax professional for advice regarding your personal situation. The form will not need to be sent to the IRS with your tax return filing.

How do I request a duplicate copy of the form?

You may request a duplicate copy of the form after February 29, 2024. Please use the Request for Duplicate IRS Form 1095 found on the Edward Jones benefits website at www.edwardjonesbenefits.com, under Resources to request a copy. We will mail a duplicate form or provide it electronically to your Edward Jones email address. Due to security reasons we will not provide electronic copies to a personal email address. Requests may take up to 5 business days to complete.

NOTE: Duplicate forms will only be released directly to the General Partner, Service Partner, or Joint Venture Service Partner. For privacy reasons, we cannot release the information to spouses, family members, accountants, etc.

What if I have questions or want additional information?

If you have additional questions about your Form 1095 or want additional information, please visit Edward Jones benefits website at www.edwardjonesbenefits.com, under Resources. You may also visit www.irs.gov or www.healthcare.gov to learn more.

You may also contact HRHELP@edwardjones.com, call 1-800-440-3060, 314-515-1006 or ext. 5-1006.