



## Adoption Assistance and Reimbursement

### Eligibility

The program is available to all associates, including employee Financial Advisors, Service Partners, Home Office Associates, Branch Office Administrators and Home Office General Partners.

### Benefits

The program has two primary benefits:

1. Resource and referral service
2. Expense reimbursement provision

### Resources

Associates contemplating adoption and who need resources should contact the firms' EAP provider, Headspace, for assistance. Headspace can provide consultation, resource listings and referrals to support agencies, public and private agencies and attorneys at no charge.

For more information, visit [www.edjeap.com](http://www.edjeap.com). You can also contact Headspace by phone at 855-420-0734.

### Adoption Expense Reimbursement

- Amount- Allows associates to be reimbursed for adoption related expenses up to a maximum of \$5,000 per child.
- Reimbursement requests must be submitted within 12 months after the finalization of the adoption.
- Expenses must be incurred while the associate was a full-time associate.
- Associates must be actively employed and full-time status with the firm at the time the reimbursement is made.
- Adoption expenses incurred by an associate's recognized Domestic Partner may be eligible for reimbursement.
- Complete the Adoption Expense Reimbursement form (pdf) and fax to (877) 479-6175.
- Documentation of payment of the submitted expenses and the final adoption paperwork is required. These documents will need to be submitted with the reimbursement form.
- Reimbursement provided through this program is subject to the tax provisions of the **Internal Revenue Code Section 137**.
- Please note that under IRS guidelines, some adoption expenses are not eligible for reimbursement. **For example, adoption of a stepchild is not an eligible expense.**
- Reimbursement payments may be subject to FICA withholding and will be considered wages for the Federal Unemployment Taxing Authority (FUTA). State taxes may also apply.



**Note:** The tax-free nature of this benefit phases out for taxpayers with modified adjusted gross income (AIG) in excess of \$207,140 and is completely phased out for the taxpayers with modified AIG of \$247,140 in 2018.

### **Domestic Partner Adoption Expense Eligibility**

Associates can be reimbursed for expenses incurred by their domestic partner's adoption of a child, if

- The associate also adopts the child
- The domestic partner adopts the child after the start of the relationship with the associate
- The associate is employed full-time at Edward Jones on the date of both the domestic partner's adoption and the associate's subsequent adoption
- All reimbursements of your domestic partner's expenses will be paid directly to you and will be 100% taxable to the associate

### **Additional Information**

Associates who are eligible for Edward Jones Parental Leave may take paid leave at the time the adoption is finalized. This time would run concurrently with the Family & Medical Leave Act.

Home Office Associates and Branch Office Administrators may use available vacation and personal day(s) for adoption-related absences.

The use of Parental Leave, FMLA leave and paid time off for adoption absences is subject to all regulations and provisions of those policies.

### **Contact**

For general information and questions, please contact HRHELP at:

Contact Email: [HRHELP@edwardjones.com](mailto:HRHELP@edwardjones.com)

Contact Phone: HRHELP at 1-800-440-3060, or 314-515-1006 or ext 5-1006