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Paid Parental Leave Guide

Preparing for a new child (through adoption or delivery) is an exciting time and affects both your personal and work life. Please take this opportunity to understand the paid parental leave program options that may be available as you determine how much time you can take off work.

Before your child arrives:

Who is eligible for paid parental leave?

Associates who work full-time (defined as those who work an average of 35 hours per week or more), have at least 12 months of service with Edward Jones, AND worked at least 1,250 hours in the past 12 months.

This policy does not apply to part-time associates. However, such associates may be eligible for a different leave of absence. For more information, see the Leaves of Absence page on the Investing in You website, www.edwardjonesbenefits.com.

How do I know which type of paid parental leave I might qualify for?

Primary Caregiver: Natural or adoptive parent who has the primary responsibility in terms of time and commitment for the active care, custody and welfare of his/her child(ren) immediately following the birth or adoption of his/her child.

Secondary Caregiver: Natural or adoptive parent who has back-up or secondary responsibility for the care of his/her child(ren), and who is not considered the primary caregiver, may start at any time in the first 12 months following the birth or adoption of his/her child.

Eligible children include newborns and child(ren) placed for adoption. It does not include stepchildren formally adopted by an associate or foster child(ren).

How much paid time off is available to me?

Home Office Associates and Branch Office Administrators:

If you are the Primary Caregiver, the firm will provide up to 16 continuous weeks of Parental Leave Pay at 100% of your base earnings from the date of the birth or adoption of the child.

If you are the Secondary Caregiver, the firm will provide up to 2 continuous weeks of Parental Leave Pay at 100% of your base earnings from the date the leave begins.

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Base earnings are equal to an associate's regular salary or regular hourly wages. Base earnings do not include bonuses, overtime compensation or other compensation. Deductions for benefits will continue during the parental leave period via payroll deductions.

Financial Advisors:

Parental Leave Pay is a minimum payment. Financial advisors receive this pay ONLY when the amount is greater than the financial advisors' actual commissions earned for the month. If a financial advisor's commissions earned are greater than the Parental Leave amount (as described below), the financial advisor will not receive Parental Leave Pay, rather the financial advisor will continue to receive his or her commissions.

Minimum guaranteed salary (MGS), Supplemental Salary and Service Partner Base Payments, if applicable, will continue during this continuous Parental Leave. Bonuses that the financial advisor is otherwise eligible to receive will be paid as scheduled.

If applicable, financial advisors on leave (continuous or intermittent) will continue their participation in the business expense plan. If applicable, Financial Advisors on continuous leave will receive a reallocation credit towards their business expense plan commission adjustment based on the number of days on leave.

Financial Advisors Trainees & Interns:

Primary Caregiver will be entitled to 16 **continuous** weeks of 100% of their weekly training pay (as of the date of the birth or adoption), except when their commissions would be greater than that amount in which case the higher commissions amount will be paid.

Secondary Caregiver will be entitled to 2 **continuous** weeks at 100% of their weekly training pay (as of the date the leave begins), except when their commissions would be greater than that amount in which case the higher commissions amount will be paid.

All Other Financial Advisors:

Primary Caregiver will be entitled to 16 **continuous** weeks of 100% of their average monthly earnings for the prior 6 selling months less the highest and lowest months prior to the birth or adoption, except when their commissions earned would be greater than that amount in which case the higher commission amount will be paid.

Secondary Caregiver will be entitled to 2 **continuous** weeks at 100% of their average monthly earnings for the prior 6 selling months less the highest and lowest months prior the beginning of leave, except when their commissions earned would be greater than that amount in which case the higher commissions amount will be paid.

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Average monthly earnings include income guarantee, commissions and fees earned. Average monthly earnings exclude all bonuses. Deductions for benefits will continue during the Parental Leave period via payroll deductions.

When financial advisors are on a leave for part of a selling month the financial advisors' Parental Leave Pay calculation will be prorated based on the number of eligible paid leave days for that month. For example, the month of September has 20 business days. A financial advisor was on paid leave for the first 12 of these 20 business days or 60% of the selling month. The Parental Leave Pay will be multiplied by 60% to determine the Parental Leave Pay for that first selling month.

Coordination of Benefits

State or Municipal Bonding Benefits

Associates who are receiving or eligible to receive paid bonding benefits from state or municipal jurisdictions will have their Parental Leave Pay reduced by the amount of the other benefits. The firm will offset Parental Leave Pay by these other paid bonding benefits, so that at no time will an associate receive more than 100% of his or her base earnings or income guarantee.

FMLA and Other Leaves

To the extent permitted by law, Parental Leave will run concurrently with any other leaves provided by law or the firm's policies, including, but not limited to, leave under the Family and Medical Leave Act, state, family and medical leave laws and/or state pregnancy leave laws. Parental Leave Pay does not extend the amount of leave available under the FMLA or applicable state or local law.

Holiday Pay

If a firm holiday falls during your approved Parental Leave period, you will be paid for the holiday, and it will count toward your 16 or 2 weeks of Parental Leave Pay. The holiday will not extend your parental leave beyond 16 or 2 weeks.

Vacation, Personal Days, Sick Days, or Other Paid Leave

Associates will not be paid for vacation, personal days, sick days, or other paid leave (jury duty, bereavement, etc.) during the period they are on Parental Leave.

The Leaves of Absence Team will coordinate the payment directly with Payroll. If you are an associate who uses the timecard system, you should not enter any time for the days you are approved for Parental Leave on your timecard.

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When can the parental leave be taken?

If elected by an eligible associate, Primary Parental Leave will start on the date of birth or adoption of the child. If the event took place on a weekend or a firm recognized holiday, the benefit will begin on that date. Secondary Parental Leave may start at any time in the first 12 months after birth but must be taken in one single continuous period of 2 weeks.

How can the parental leave be taken?

Consecutive Weeks

The Parental Leave must be taken as consecutive weeks of full-time off work. The parental leave benefit cannot be taken on an intermittent basis.

Both Parents are Associates

If both the Primary and Secondary Caregiver are eligible, full-time associates the maximum amount of Parental Leave for both parents is a combined total of 18 weeks for a child. One parent can take leave as the Primary Caregiver for 16 weeks and at the same time, the other parent can take leave as a Secondary Caregiver for 2 weeks. The time may run concurrently, or Secondary Caregivers may choose to take leave within the first 12 months after birth. If both the Primary and Secondary Caregivers choose to take leave at birth, if the event took place on a weekend or firm recognized holiday, the leave will begin on the next business day.

Multiple Births

Parental Leave provides up to 16 weeks (or 2 weeks for Secondary Caregivers) per birth event or adoption event, regardless of multiple births (twins, triplets, etc.) or adopting more than one child. However, associates may take advantage of the benefit again for a subsequent birth or adoption event.

Requesting a Paid Parental Leave:

1. Navigate to the Time, Absence and Leave Management system and select My Time Off under the Time off Requests & Scheduling tab.
2. Create a New Request and navigate to the following screen where you can either select a time of request due using paid time off, or by selecting Leave of Absence Request.
3. Select Leave of Absence Request.
4. Create a New Leave Request and select "I need time to bond with a new child" as the Reason.
5. Complete the rest of the workflow and submit your request. Submit your request for Parental Leave 4 weeks before your child's anticipated due date or adoption of your child.

You will have a dedicated Case Manager on the Leave of Absence team that will review and approve your request if eligibility has been confirmed and all the required information has been

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provided in the Leave Request. In the request, provide an email address that your Case Manager will use throughout the duration of your leave to provide updates on the status of your request. Contact information for your Case Manager will be provided to you once your leave is opened.

When Your Child Arrives

When your child arrives, please ensure that you or a family member updates your Case Manager within 24 hours of the birth or adoption. Delaying this notice may impact the payment of the parental leave benefit.

Add your child to your medical coverage (if desired). You must add the child to your coverage within 31 days of the birth date or final placement for coverage to be effective on the birth date or final placement date. Otherwise, you must wait until the next open enrollment period for coverage effective January 1 of the following year. You should not wait until you receive the birth certificate or social security number for your child to enroll him/her under the Edward Jones healthcare plan. To add your child or make any other benefit changes, please contact our Benefits team at 314-515-1006 or via email at Enroll@edwardjones.com.

This is a great time to review your beneficiaries under your life insurance and retirement plans and make any necessary updates. Please note that minor children should not be named as beneficiaries under life insurance plans unless you have a Trust or named Guardian. Insurance carriers cannot pay benefits to minors. Beneficiary changes can be made to via your Personal & Job information once you return to work.

- **Contact HelpDesk to turn on your out of office reply.** If you have not already set up an automated email reply, HelpDesk can help you or your leader do this now. Please call them at 1-800-441-2222 x52432.

Preparing to Return to Work

A week prior to your return to work, you should contact your Case Manager to confirm your actual return date. Please be sure to provide at least 2 business days advance notification prior to returning to work so that your system access may be restored prior to your return.

Failure to report to work at the end of your parental leave or the date you indicated you would return from the parental leave will be considered a voluntary termination.

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Contact

For general information/questions, *related to leave of absence options, payment or processes*, please contact HRHELP at: HRHELP@edwardjones.com, 1-800-440-3060, or 314-515-1006 or ext 5-1006.

If you are on an approved leave of absence from Edward Jones and have specific questions related to your leave of absence, please contact your Case Manager.