Step 1: Log In

Go to the EdAssist/Bright Horizon's website at Edwardjones.edassist.com or https://clients.brighthorizons.com/edwardjones and login using your user name (P or J Number or custom created username) and password. If site is not loading, try to clear your cache.
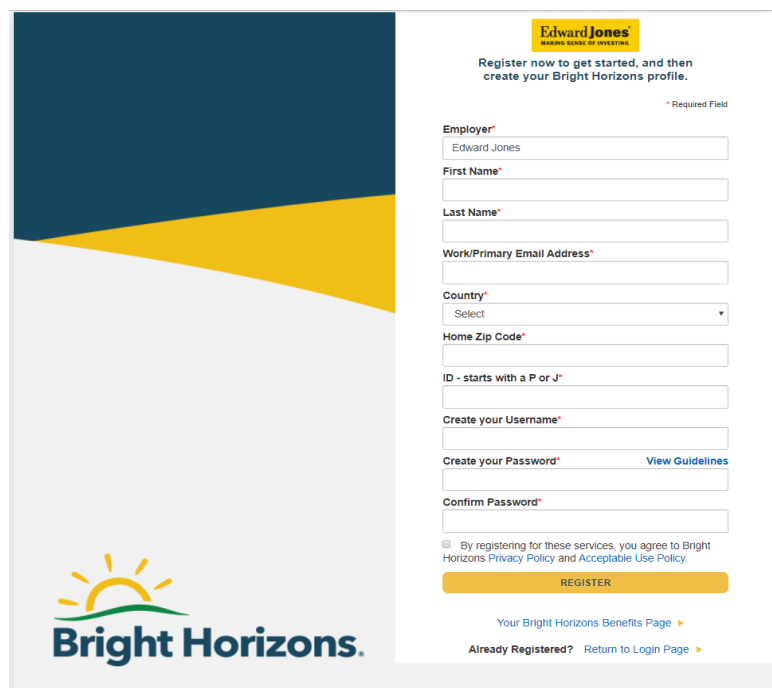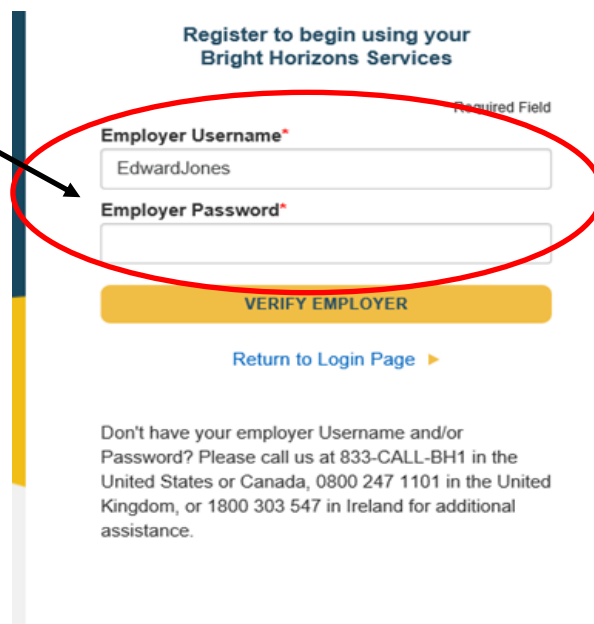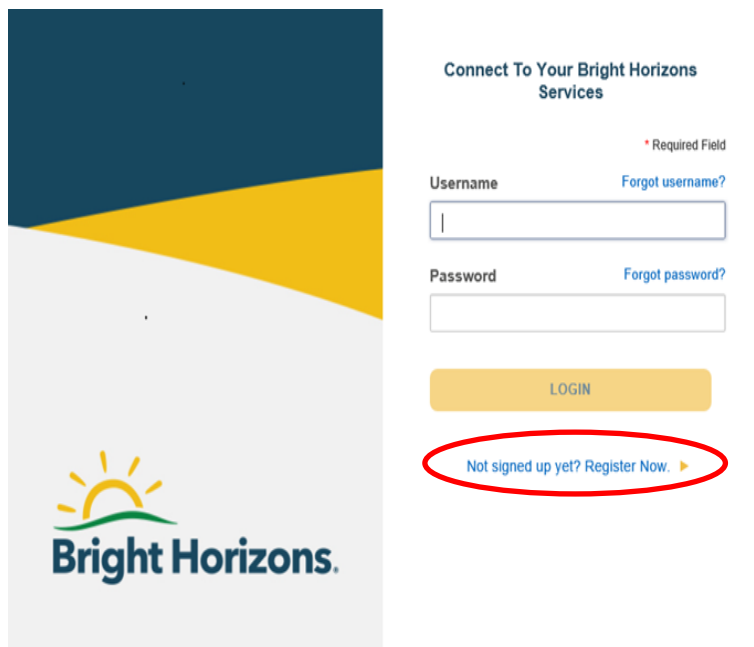
First time logging in?

Click on Not Signed Up Yet? Register Now

Enter your Employer info:

      Username:EdwardJones

      Password: Benefits4You

You will need to create your Bright Horizon profile including a password. The password must be a minimum of 8 characters and include an upper and lower case letter and also a special character.

Connect To Your Bright Horizons Services

* Required Field

Username   Forgot username?

Password   Forgot password?

LOGIN

Not signed up yet? Register Now. ▶

Bright Horizons.

Register to begin using your Bright Horizons Services

Required Field

Employer Username*

EdwardJones

Employer Password*

VERIFY EMPLOYER

Return to Login Page ▶

Don't have your employer Username and/or Password? Please call us at 833-CALL-BH1 in the United States or Canada, 0800 247 1101 in the United Kingdom, or 1800 303 547 in Ireland for additional assistance.

EdwardJones MAKING SENSE OF INVESTING

Register now to get started, and then create your Bright Horizons profile.

* Required Field

Employer*

Edward Jones

First Name*

Last Name*

Work/Primary Email Address*

Country*

Select

Home Zip Code*

ID - starts with a P or J*

Create your Username*

Create your Password*   View Guidelines

Confirm Password*

☐ By registering for these services, you agree to Bright Horizons Privacy Policy and Acceptable Use Policy.

REGISTER

Your Bright Horizons Benefits Page ▶

Already Registered? Return to Login Page ▶

Bright Horizons.

Step 2: Start New Application

- On My Activity menu bar, click New Application, verify all personal information is correct and hit continue.

- Click on the drop down for education objective and enter Certification/Designation and Field of Study.

- Under What Program Would you like to Use click on Professional Designation Program.

Step 3: Start New Application

Used the program before?

- Your most recent Education information will populate.
- Review Education Information
  If correct hit continue.
  If not correct, edit as described in
Step 4

First time using the program?
Enter Education information as described in
Step 4.

Step 4: Enter Education Information

- Under Education Information, click the Edit link near the Provider field

- Use Search for Education Providers dialog box:

- Type provider name or part of provider name in the Name field

- Click Search button

- First 3 results will display, to view more click show more results.

- Click the button for the correct provider

- Under Education Provider, click the edit Link near the Student ID field

- Use Add Student ID dialog box:

Enter Student ID or leave it blank if you do not know it.

Step 5: Enter Session Information

- Enter Start Date (most commonly the date study material were purchased)

- Enter End Date (most commonly the exam date)

- Click correct radio button if completing program with this session

Step 6: Enter Course & Expense Information

- Under Course & Expense Information, click the Add Course & Related Expense link.
- Use Edit Course dialog box:

  Enter Course # as it appears on itemized invoice (if no course number provided, enter 123)

  Enter Course Name as it appears on itemized invoice

  Enter Tuition Amount to be reimbursed. Enter in Add a Course & Related Expense for books.

- Click Add an Expense
- Add book expense if any. Hit Save expense and the Add Course.
- If no other expenses hit Continue.

Step 7: Enter Agreement Information

- Review all the agreements and click the radio button and check boxes to accept. Hit continue.
- Review all the information, and sign your name and hit continue.

Agreements

Participant Agreement

I have carefully read, fully understand and agree to comply with Tuition Program Guidelines.

I understand that any courses not approved by my approver and/or company designee are not eligible for reimbursement, and that I am responsible for any tuition costs or fees that are not approved and/or do not meet program guidelines.

I understand that federal and state tax laws may require tuition assistance to be treated as taxable income and applicable taxes will be withheld from my approved payment amount at the time of reimbursement.

☐ I accept the terms and conditions of this agreement.

FERPA Agreement

The Family Educational Rights and Privacy Act of 1974, as amended (FERPA) ensures students of the right to privacy and confidentiality with respect to their educational records and limits access to the information contained in those records. Under FERPA, you have the right to deny authorization to release your educational records. However, in order to receive tuition assistance through Bright Horizons EdAssist Solutions, it is necessary for Bright Horizons to receive and share your educational records with your employer. By checking "I Agree" below, you agree as follows:

- Educational institutions, schools, agencies or individuals holding my educational records may release such records to Bright Horizons.
- Bright Horizons may release my educational records (whether received from educational institutions, schools, agencies, or individuals) to my employer.
- This consent shall remain in effect until I submit a written request to cancel the authorization.

If you do not agree with the above terms, please understand that we will be unable to process your tuition assistance application, and your application will be cancelled.

☐ I accept the terms and conditions of this agreement.

Repayment Agreement

On each January 1 (for three years after a Tuition Reimbursement payment is received by Associate), Edward Jones will forgive 1/3 of the payment. If Associate terminates employment before this three year time frame, the following payback guidelines will apply:

If Associate terminates before January 1 of the first calendar year following a Tuition Reimbursement payment, Associate agrees to pay Edward Jones the full amount (100%) of such payment. If Associate terminates before January 1 of the second calendar year following a Tuition Reimbursement payment, Associate agrees to pay Edward Jones two-thirds (66%) of such payment. If Associate terminates before January 1 of the third calendar year following a Tuition Reimbursement payment, Associate agrees to pay Edward Jones one-third (33%) of such payment.

☐ I agree to the terms of this Repayment Agreement

By providing my electronic signature, I acknowledge that the preceding information is accurate and complete to the best of my knowledge. I meet all of the requirements of the Edward Jones Tuition Reimbursement Policy, and acknowledge and agree that Edward Jones reserves the right, in their sole discretion, to modify, amend, change, or terminate this plan at any time and for any reason without advance notice.

Your Name:

Stacey Kohner

Enter your name exactly as it appears above.

Step 8: Review and Submit your Application

A summary of your course information will be presented

Review Education Information

- If correct, click the Next button

- If not correct, edit by selecting the Edit or Delete button under Action, then click the Next button

Programs   ✏ Edit

Employee Program	Education Program	Speciality
Professional Designation Program (US)	Certification/Designation	Certified Financial Planner (CFP)

Education Provider

Name	Provider Code
Kaplan College	T21816

Address
6409 Congress Ave
Ste 100
Boca Raton, FL 33487

Expenses   ✏ Edit

Session Dates
Aug 13, 2019 - Dec 18, 2019

COURSE	CF Exam 1 , (CFP101)		
	Credits	Grade	Verified
	N/A	NA	N/A
	View More		Requested $700.00

TOTALS		
	Requested	$700.00
	Approved	$0.00
	Total Benefit	$700.00

Agreements   ✏ Edit

Grants, Scholarships & Discounts
None $0.00

SUBMIT APPLICATION   Cancel

Step 9: Submit Supporting Documents

Go to the tabs at the top of your page and go to your history. Click on your application #. You can submit documents by uploading or faxing.

o   To upload, only upload one document at a time. Either drag your document or select your file to upload. Chose your documentation type from the drop down list; grades, proof of payment, corrections. If entering grades, remember to enter in your grade you received. Click Submit Document.

o   To fax, click the What document types are supported. From there, a box pops up to print off a fax cover sheet. Fill out the fax cover sheet and included the necessary documents. Click Print Fax Cover Sheet and it will populate. See fax number on the form.

Tuition Program Management

Home   History   Admin   **NEW APPLICATION**

Supporting Documentation   What document types are supported?

Please upload completion documentation. Only one Document Type can be selected at a time.

Drag Document here to upload or Select File

This application currently has no supporting documentation.

Status History

	MESSAGE	From **EdAssist Admin**	Oct 30, 2019
		Larry Cruz (Level 1 approver) has	10:36 AM CDT
		been Notified for this application	
		by the Program Administrator.	
	FORWARDED TO SUPERVISOR FOR REVIEW	Status Change	Oct 30, 2019 10:36 AM CDT

Supporting Documentation   What

Please upload completion documentation. Only one Document Type can be selected at a tir

The file **FAQ's Tuition.pdf** is ready to upload. The file will not upload until Submit Document button is clicked.

Document Type

Grades

Course Name   Grade

CFP 1   P

Comment

Optional

SUBMIT DOCUMENT   Cancel

Supported Documents

Documents must be submitted in accordance with the program policy. Preferred document formats are pdf or jpg. Documents provided must be legible, on letterhead or bearing the school insignia and in a format that can in no way be altered. Highly confidential information such as Social Security Number (SSN) or Credit Card Number should not be displayed. Documentation that is not legible or that has been altered in any way (except the removal of SSN or Credit Card Number) will not be accepted. You will receive email confirmation of receipt of your uploaded documents within 24 hours. Please select one Document Type at a time. Only upload file(s) for that Document Type before submitting.

OK   Print Fax Cover Sheet