

Adoption Assistance and Reimbursement Program

Eligibility	<p>Full-time Financial Advisors, Home Office, Branch Office Administrators and Selling General Principals.</p> <p>Home Office General Partners are not eligible.</p>
Amount	<p>Allows associates to be reimbursed for adoption-related expenses up to a maximum of \$5,000 per child. Qualified expenses include agency fees, legal fees, home study fees and any reasonable and necessary travel expenses related to the adoption. Expenses must be incurred while the associate is a full-time associate.</p>
Requirements for Reimbursement	<p>Associates must be employed with the firm in an eligible position both when the expenses are incurred through when reimbursement is made. Documentation of payment of the submitted expenses is required and reimbursement requests must be received within 12 months of the date the adoption is finalized.</p>
Tax Consequences	<p>Reimbursement provided through this program is subject to tax provisions and applicable withholdings.</p>
Human Resources Support	<p>Please fax your completed form to the HR Benefits department at 877-479-6175.</p> <p>Questions: contact HR Help: HRHELP@edwardjones.com 1-800-440-3060 314-515-1006</p>

This program may be changed or terminated at any time at the discretion of Edward Jones.

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Adoption Assistance Application

Name (last name, first name) _____

Employee id# (J/P#) _____

Date of Hire (Month/Date/Year): _____/_____/_____

Position: _____

Department / Branch #: _____

Extension / Phone Number: _____

Expense Documentation:

Type of Fee	Amount	Date
Agency Fee		
Home Study Fee		
Legal Fee		
Travel Expenses		
Total		

Total Amount Submitted for Reimbursement \$ _____.

Date of Final Adoption (Month/Date/Year): _____/_____/_____

*****Please Attach Final Adoption Papers & Expense Documentation*****

Signature _____

Date (Month/Date/Year): _____/_____/_____

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