

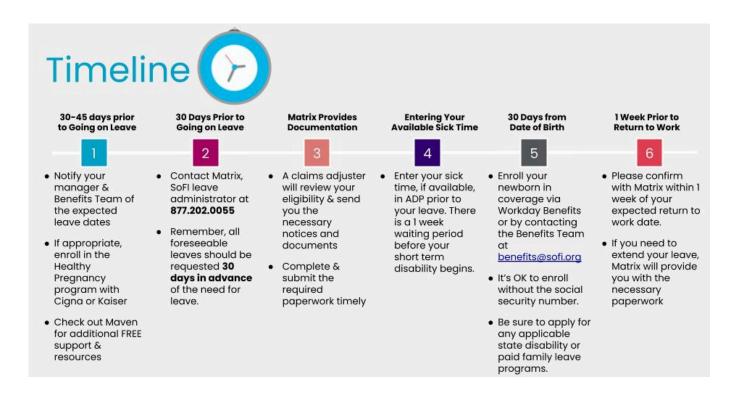


2025

Leave of Absence Checklist

Whether you're having a baby, attending to personal matters or need time off for other reasons, ensure a smooth transition before and after your leave by taking these important steps.

- Discuss your leave plans with your manager as far in advance as possible. In most cases, you should
 talk to your manager 30-45 days before you intend to start your leave. This helps your manager assess
 the business impact of your leave and ensure your work is covered in your absence. During your
 discussion, give your manager your expected leave start date and return-to-work date.
- Between 30-45 days prior to the start of your leave, submit your leave request by contacting Matrix at 877.202.0055 or www.matrixabsence.com. Don't forget to read your Leave of Absence packet that is sent to you. It contains important information and actions for you to complete.
- Complete your leave paperwork in a timely manner to ensure disability payments, if applicable, are
 processed as quickly as possible. Generally, you have 15 business days to provide the necessary
 documentation so that a determination may be made for your leave.
- Connect with the Benefits team prior to your leave to get aligned and your questions answered. If you
 have benefit payroll deductions, you need to make arrangements to pay for them prior to or during your
 absence. The Benefits team will connect with you directly regarding arrangements to pay any missed
 benefit payroll deductions.
- Remember to sign up for direct deposit with Matrix so there are no hassles with being paid during your leave. Matrix makes payments on Friday each week. However, it can take 1-2 business days for the deposit to reflect in your bank account.
- Enter sick time, if available, in ADP prior to your leave so you receive income during your seven-day waiting period prior to short-term disability beginning. If you need assistance at any point in the process, please contact payroll at askpayroll@sofi.org.
- If you reside in a state with a paid disability or family leave program, please remember to file with your state's program. Matrix will provide you additional information about your state's applicable paid leave programs. However, it is your responsibility to file and complete this task.
- On your last day of work, set up an out-of-office message on your email and voicemail and provide the name, email and phone number of the person who is covering for you.
- If appropriate, add your baby to your insurance plan within 30 days of birth or adoption by logging into
 Workday Benefits. You may want to consider enrolling in Flexible Spending Accounts to use pre-tax
 dollars to reimburse yourself for qualified expenses. Remember to review your beneficiaries in Workday
 Benefits and update, if desired.
- Consider and update, if appropriate, your tax exemptions in ADP.
- Need support? Check out Maven, Modern Health, and the Parents at SoFi employee resource group for additional support and resources for new parents



Your Return to Work: A Few Things to Keep in Mind

- Obtain clearance from your healthcare provider to return to work. Please provide the Return to
 Work note to Matrix or hrleaves@sofi.org 5 days in advance of your return to work date. For most
 leaves, you should contact your manager and Matrix one week before your scheduled return to
 confirm your return-to-work date. Note: System access cannot be restored if no return to work note
 is provided.
- Consider enrolling in the Return to Work or New Parent tracks with Maven. More information can be found at SoFi Central/ US Benefits/ Maven site.
- Check out resources for nursing mothers. Each office location provides for a private, dedicated space for mothers who are breastfeeding. In addition, you may want to check out the support from Maven, who can assist with lactation counseling and other needs.
- Join the #circle-parentsatSofi group on Slack to receive support from other parents at SoFi.



Questions? We are here to help.

SoFi Benefits Health Advocate

Email: hrleaves@SoFi.org or benefits@sofi.org

Phone: 866.989.2942

