

Summary Annual Report

Willamette University

Plan Number 512

This is a summary of the annual report for Willamette University (the Plan), Employer Identification No. 93-0386972 for the period 01/01/2024 - 12/31/2024 (Plan Year). The annual report has been filed with the Employee Benefits Security Administration (EBSA) as required under the Employee Retirement Income Security Act of 1974 (ERISA).

INSURANCE INFORMATION

The Plan has a contract with:

- ACE American Insurance Company
- Canopy
- The Guardian Life Insurance Company
- Standard Insurance Company
- Kaiser Foundation Health Plan

To pay: Medical, Dental, Life ADD, EAP, LTD, CII insurance claims under the terms of the plan. The total premiums paid for the Plan Year ending on 12/31/2024 were \$7,521,500.77

The contract with Standard Insurance Company is an "Experience Rated" contract. The premium costs of this benefit are affected by, but not limited to, the number and size of claims received during the plan year. The total insurance premiums received for this benefit for the plan year was \$164,490.74. From those premiums, \$150,029.31 was paid out for benefit claims during the same plan year.

YOUR RIGHTS TO ADDITIONAL INFORMATION

You have the right to receive a copy of the full annual report, or any part thereof on request. This report lists insurance information including any commissions paid by the insurance carrier.

To obtain a copy of the full annual report, or any part thereof, write or call the office of the Plan Sponsor and Administrator:

Willamette University
900 State Street
Salem, OR 97301
503-370-6210

There may be a charge to cover copying cost up to \$0.25 per page.

You also have the legally protected right to examine the annual report at the main office of the Plan indicated above and at the U.S. Department of Labor in Washington, D.C., or to obtain a copy from the U.S. Department of Labor upon payment of copying costs.

Requests to the Department should be addressed to:

U.S. Department of Labor
Employee Benefits Security Administration
EBSA Public Disclosure Room
200 Constitution Avenue, NW, Room N1513
Washington, D.C. 20210