

# 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 01/01/2023 - 12/31/2023 (Plan Year). The annual reports have 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 12/31/2023 were \$6,731,021.50

### 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