

## **SUMMARY OF MATERIAL MODIFICATIONS #1**

### **Archdiocese of Milwaukee 403(b) Plan (“PLAN”)**

Due to the recent amendment of the above-referenced Plan, changes have been made that could affect your rights under the Plan. This Summary of Material Modifications (SMM) describes the recent Plan amendment and how that amendment may affect you. This Summary of Material Modifications overrides any inconsistent information included in the Plan’s Summary Plan Description (SPD) or other Plan forms.

The modifications described in this Summary of Material Modifications are effective as of January 1, 2026. All other provisions are effective as described in the SPD.

#### **GENERAL INFORMATION AND DEFINITIONS**

Article 2 of the SPD describes general information and definitions applicable to the Plan. The Plan has been amended to change certain general information or definitions. This section describes the changes that were made to the information contained in Article 2 of the SPD.

The Plan has been amended to modify the Participating Employers under the Plan. Under the Plan as amended, in addition to Archdiocese of Milwaukee, the primary Employer maintaining the Plan, the following Employer(s) are also maintaining the Plan:

- Saint Francis De Sales Seminary, Inc.
- Society for the Propagation of the Faith, Archdiocese of Milwaukee
- Archdiocese of Milwaukee Catholic Community Foundation, Inc.
- Pius XI Catholic High School, Inc.
- Seton Catholic Schools, Inc.
- St. Anthonys Congregation
- St. Mary Springs Academy of Fond du Lac, Wisconsin, Inc.
- St. Mary's Congregation
- Congregation of All Saints Catholic Church
- St. Hyacinths Congregation
- Holy Family Congregation
- Three Holy Women Congregation
- St. Catherine's Congregation
- St. Sebastian Congregation
- Christ King Congregation
- St. Roman Parish
- St. Thomas Moore High School
- St. Charles Borromeo Parish
- St. John XXIII Congregation
- St. Joseph Catholic Academy
- St. Eugene Congregation
- St. Robert
- St. Monica's Congregation
- St. Jude Congregation
- St. Adalbert Parish
- St. Stephen

- Prince of Peace/Principe De Paz Congregation
- St. Rafael the Archangel Congregation
- St. Charles Congregation
- Congregation of St. John's Cathedral

If you are an Employee of any of these Employers, you may be eligible to participate in the Plan as described in Article 4 of the SPD.

### **MINIMUM AGE AND SERVICE REQUIREMENTS**

Article 4 of the SPD describes the minimum age and/or service requirements that you must satisfy to be eligible for contributions under the Plan. The Plan has been amended to modify the minimum age and/or service requirements. This section describes the new minimum age and/or service requirements under the Plan, as amended.

**Special eligibility rules.** The following special rules apply for purposes of determining eligibility under the Plan: Eligible Employees classified by the Employer as assigned Archdiocesan Priests are immediately eligible to participate in the Plan for purposes of Salary Deferrals.

### **Additional Information**

If you have any questions about the modifications described in this Summary of Material Modifications or about the Plan in general, or if you would like a copy of the SPD or other Plan documents, you may contact:

Archdiocese of Milwaukee  
3501 S. Lake Dr.  
St. Francis, WI 53235  
(414) 769-3300