U.S. EMPLOYEES

# YOUR 2026 ROK WELL BENEFITS GUIDE

ROK WELL | BENEFITS

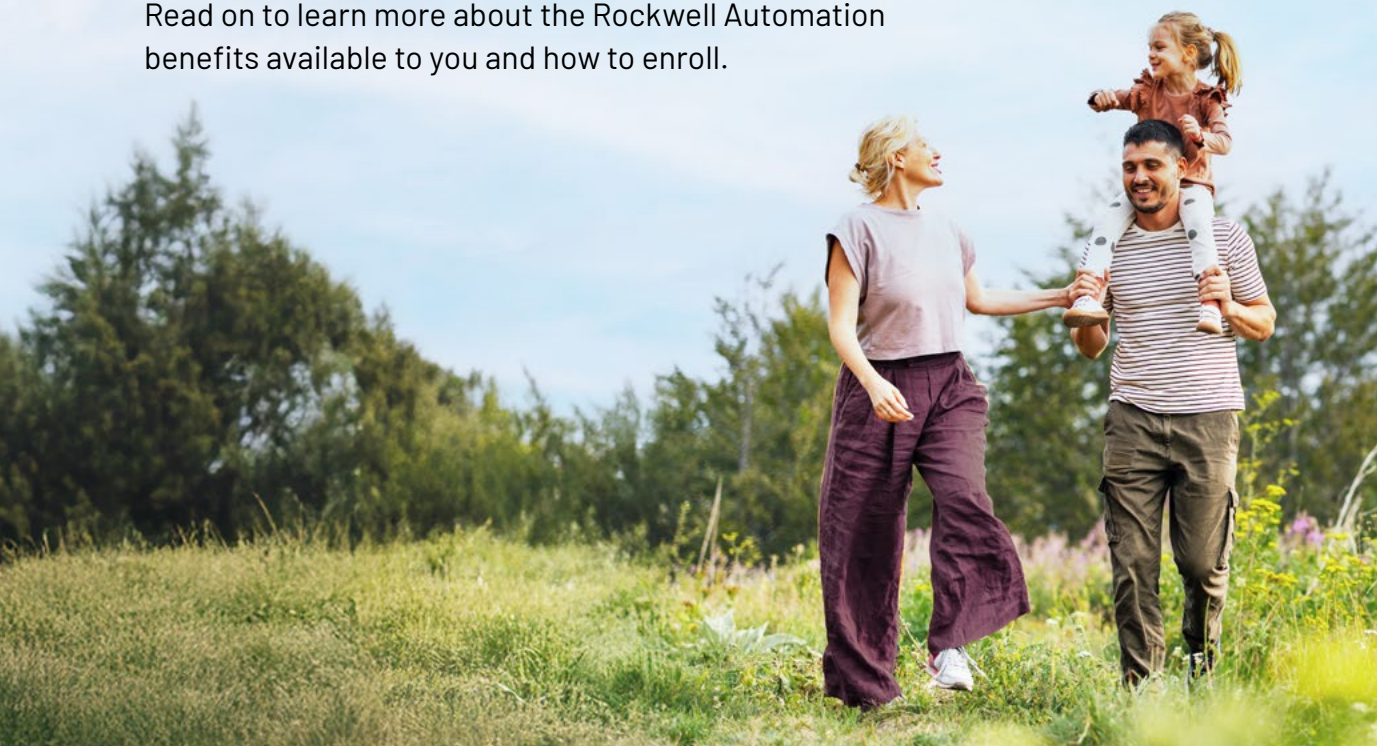


# WELCOME

## TO ROCKWELL AUTOMATION

The world's largest company dedicated to industrial automation! No matter where you work—an office, a production facility, a customer location, or on the road—you can count on your benefits to support you in living your best life. At Rockwell, we strive to offer you competitive benefits that deliver value while understanding the needs of a diverse workforce.

Read on to learn more about the Rockwell Automation benefits available to you and how to enroll.



We provide this brief overview for employees and prospective employees. However, this overview is not intended to be a complete explanation of the various plans. Detailed descriptions of individual plans and policies are found in the respective Summary Plan Descriptions (SPDs). The Company hopes to continue these plans indefinitely but reserves the right to amend, suspend, or terminate plans in whole or in part at any time. Further, this overview does not create nor imply a contract of employment. In the event of a discrepancy between this document and the official Plan Document, the Plan Document will govern.


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# ENROLL

> ENROLLMENT CHECKLIST

> WHAT'S NEW IN 2026



# YOUR ENROLLMENT CHECKLIST

1

## Review Your Options

Use this guide and **raquickfind.com** to learn more about your benefits, and don't forget to see **what's new in 2026!**

**If you're a new hire in 2026**, you'll have 31 days from your hire date to make your elections. After you enroll, you can only make changes during the year if you have a qualifying life event—such as getting married or divorced, welcoming a new addition to your family, or enrolling in or losing your other group coverage—and report it within 31 days to the Rockwell Alight Service Center (RASC). Otherwise, you have to wait until the next Annual Enrollment period.

### If You're Scheduled to Work 20 Hours or More Per Week[1]

| Automatically begin on your first day at Rockwell | Begin the effective date after you enroll[2] | Begin at a later time |
|---|---|---|
| • Basic Life Insurance<br>• Business Travel Accident Insurance<br>• Short-Term Disability (STD)<br>• Retirement Savings Plan—401(k)<br>• ComPsych Employee Assistance Program (EAP)<br>• VisionAccess Discount Program<br>• International SOS<br>• Vacation<br>• Holiday pay<br>• OnTrack well-being program<br>• Parental leave<br>• Bright Horizons Enhanced Family Supports and Back-Up Care | • Medical<br>• Dental<br>• Vision<br>• Flexible Spending Accounts (FSAs)<br>• Supplemental Life Insurance<br>• Accidental Death and Dismemberment (AD&D) Insurance<br>• Long-Term Disability (LTD); will default to LTD Option 1 unless you decline coverage during enrollment<br>• MetLife Legal Plans<br>• MetLife Auto and Home Insurance<br>• MetLife Pet Insurance | • ROK in Action (after six months of continuous employment)<br>• Adoption assistance (after 12 months of continuous employment)<br>• Caregiver leave (if approved for leave under the Family and Medical Leave Act (FMLA) and if you have 12 months of employment with 1,250 hours and haven't used your 12 weeks of leave for another reason)<br>• Calm mobile app (first of the month following hire) |

[1] If you're a part-time employee regularly scheduled to work 20–31 hours per week, your vacation accrual and holiday pay will be prorated, and you'll pay twice the full-time rate for medical and dental coverage.

[2] If you're enrolling as a new hire, your effective date is your hire date.

### If You're Scheduled to Work Less Than 20 Hours Per Week

| Automatically begin on your first day at Rockwell | Begin at a later time |
|---|---|
| • Business Travel Accident Insurance<br>• Retirement Savings Plan—401(k)<br>• ComPsych Employee Assistance Program (EAP) | • ROK in Action (after six months of continuous employment)<br>• Calm mobile app (first day of the month following hire) |

### ARE YOU A STUDENT ASSOCIATE?

You're eligible only for medical coverage and the Retirement Savings Plan—401(k). You must enroll in medical coverage within 31 days of your start date.

# YOUR ENROLLMENT CHECKLIST (CONT.)

**INFORMATION ABOUT YOUR DEPENDENTS!**

If you're enrolling a dependent for the first time, you'll be asked to provide proof of dependent eligibility when adding dependent(s) to your coverage. This includes marriage certificates, birth certificates, etc.

## 2

## Choose Who to Cover

**You**

If you're a benefits-eligible full-time employee scheduled to work at least 20 hours per week. If you're a student employee working full time, you're eligible for medical coverage and the Retirement Savings Plan only.

**Your Spouse/Domestic Partner**

Including registered same-sex/opposite-sex domestic partner with their name, birthday, and Social Security number for proof of dependent eligibility.

**Your Child(ren)**

Up to age 26 (or older if permanently disabled), with their names, birthdays, and Social Security numbers for proof of dependent eligibility.

## 3

## Use Your Tools

**raquickfind.com**

Find everything you need to know about enrollment, including videos and more.

**Your Benefits™**

If you need specific plan details, you should reference the Summary Plan Description (SPD) for a particular plan or the Summary of Benefits and Coverage (SBC). You can find SPDs and SBCs by going to **Your Benefits™** > **Summary Plan Descriptions**.

## 4

## Enroll Online

**Log in to Your Benefits™** using your user ID and password.

**Click** on the menu at the top left. Select **"Benefits"** to enroll.

**Enroll** in the benefits you want. Shortly after you enroll, you should receive your applicable ID cards in the mail.

**COVERING A SPOUSE/ DOMESTIC PARTNER?**

If your spouse/domestic partner is eligible for subsidized medical coverage under another employer, your contributions will increase by $780 if you earn less than $50,000 annually and by $1,800 if you earn more than $50,000 annually.

You'll also pay tax on the coverage's value (imputed income) for your spouse/domestic partner or their child if they don't qualify as dependents for federal income tax. This adjustment doesn't apply if your partner is a retiree, self-employed, or a Rockwell employee.

# WHAT'S NEW IN 2026

Every year, we take a close look at our benefits and consider what changes are necessary. We want to provide you with comprehensive, inclusive coverage—both at work and home. Our benefits prioritize your health and well-being so you're better equipped to take on anything life throws at you.

## New Prescription Drug Vendor

Rockwell has transitioned from CVS Caremark to Optum Rx for prescription coverage. If you are enrolled in UnitedHealthcare, you will receive one ID card for both medical and prescription coverage. Some members may not receive a physical ID card if the delivery method is set to paperless on **myuhc.com**. You can log in to your UnitedHealthcare account to print your virtual card or change your delivery settings to request a mailed ID card. Your UnitedHealthcare ID card will display your Optum Rx prescription information. If you're enrolled in Centivo, you'll receive a separate ID card from Optum Rx in addition to your medical ID card.

## New Life Insurance Changes

If you plan to enroll in Spouse Life, Child Life, and/or AD&D Insurance, you'll need to confirm which dependents should be covered. This helps ensure that only eligible dependents are enrolled. Be prepared to provide their information during your enrollment.

## Increase in Medical Contributions

In line with our commitment to keeping expenses as affordable as possible for you and your family, Rockwell Automation continues to pay the majority of your premium costs. However, due to the continual rise of health care costs, you'll notice an increase in your medical plan contributions. This increase is still below the national average.

## Increase to Spousal Surcharge

To help manage rising health care costs in a fair and balanced way, the spousal surcharge will be adjusted for 2026. For spouses earning less than $50,000 annually, the surcharge will be $65 per month, and for spouses earning more than $50,000 annually, the surcharge will be $150 per month. This change reflects the shared responsibility of managing health care expenses and aligns with industry practices across the country.

## Health Clinic Enhancements

Rockwell is making enhancements to onsite health clinic services. This includes expanding behavioral health support through the Milwaukee office, offering a flat structure for onsite services, and improving medication access with a curated prescription list. You can expect targeted communications at your location—ensuring the right resources are available where they're needed most.

## 401(k) Plan Updates

Starting in 2026, we'll be making changes to the Rockwell Retirement Savings Plan (the "401(k)" Plan) as we implement two key provisions of the SECURE 2.0 Act related to catch-up contributions for those aged 50+. These provisions are designed to align with new federal guidelines and enhanced savings opportunities for eligible employees. Fidelity will communicate with you directly if you're impacted by the changes. No action is required at this time.

**READY TO ENROLL?**

Go to **Your Benefits™** by visiting **digital.alight.com/rockwellautomation** and enroll within 31 days of your start date.

# HEALTH

- MEDICAL PLANS
- PRESCRIPTION DRUGS
- HEALTH SUPPORT
- DENTAL
- VISION
- TAX-ADVANTAGED ACCOUNTS



## COVERING YOUR SPOUSE?

If you're covering a spouse/domestic partner, you must also actively confirm if they don't have subsidized medical coverage available through their employer, otherwise you'll default to paying more per year ($780 each year if your annual salary is less than $50,000 or $1,800 if at least $50,000).

# MEDICAL PLAN COMPARISON

### Review the Features to See Which Plan Is Best for You

You can enroll in the **Broad Access HSA** or the **Broad Access** medical plans through UnitedHealthcare (UHC). If you live in Eastern Wisconsin, you have a third medical plan option to choose from—the **High-Performance** medical plan through Centivo.

Each medical plan option has its own unique design. Take a look and see which plan best fits the needs of you and your family.

| | Broad Access HSA | Broad Access | High-Performance (Eastern Wisconsin) |
|---|---|---|---|
| **Network**<br>The group doctors, hospitals, clinics, and specialists that are covered by your medical plan. | **UnitedHealthcare (UHC)** | **UnitedHealthcare (UHC)** | **Centivo** |
| **Contributions**<br>The amount you pay out of your paycheck. | ●○○<br>**Lowest** | ●●●<br>**Highest** | ●●○<br>**Middle** |
| **Deductible**<br>The amount you pay before the plan begins to pay a portion of your eligible expenses. | ●●●<br>**Highest** | ●●○<br>**Middle** | ○○○<br>**No Deductible**[1] |
| **Your Out-of-Pocket Maximum (OOPM)**<br>The maximum amount you pay in before the plan pays for remaining costs for the rest of the year. | ●●○<br>**Middle** | ●●●<br>**Highest** | ●○○<br>**Lowest** |
| **Why You Might Choose It** | You want to pay less for coverage each month and don't mind the higher deductible. You also want to take advantage of the HSA tax-advantages and employer contribution based on your family tier. See page 20 for more details. | You want to pay more upfront for coverage through contributions but less out of pocket when you need care. You also want to take advantage of getting your prescription drugs covered before meeting your deductible. | You live in Eastern Wisconsin and you want to pay less for care with predictable costs and no deductible, and you don't mind working closely with your primary care physician.<br>To see if you're eligible to enroll in the High-Performance plan, review the ZIP code list on raquickfind.com/zip-codes. |

[1] You'll have an out-of-network deductible for any services that aren't covered by the Centivo network. See page 9 for more details.

## ENROLLING IN THE BROAD ACCESS HSA PLAN?

After you enroll, you'll receive an enrollment kit from HealthEquity. While you wait, visit **learn.healthequity.com/rockwell/hsa** or download the mobile app to start taking advantage of the tools and resources. If you have questions, call HealthEquity at **1.866.346.5800**.

# MEDICAL PLANS

Here's a look at how each plan works. Under all options, out-of-network providers may bill you for any difference above what the plan pays.

| | Broad Access HSA | | Broad Access | | High-Performance (Eastern Wisconsin) | |
|---|---|---|---|---|---|---|
| | In-Network | Out-of-Network[1] | In-Network | Out-of-Network[1] | In-Network | Out-of-Network[1] |
| **Network** | UnitedHealthcare (UHC) | | UnitedHealthcare (UHC) | | Centivo | |
| **HSA Money from Rockwell** | You Only: **$500**<br>You + Family: **$1,000** | | **N/A** | **N/A** | **N/A** | **N/A** |
| **Deductible** | | | | | | |
| You Only | **$2,000** | **$4,000**[3] | **$1,250** | **$2,500** | **None** | **$5,000** |
| You + Family | **$4,000** | **$8,000**[3] | **$2,500** | **$5,000** | **None** | **$10,000** |
| **Out-of-Pocket Maximum** | | | | | | |
| You Only | **$4,000** | **$8,000** | **$3,000** | **$6,000** | **$2,000** | **$9,100** |
| You + Family | **$8,000** | **$16,000** | **$6,000** | **$12,000** | **$4,000** | **$18,200** |
| **What You Pay After You Meet Your Deductible[2]** | | | | | | |
| **Preventive Care** | **$0**/no deductible | **40%** | **$0**/no deductible | **40%** | **$0**/no deductible | **50%** |
| **Office Visits** | **20%**<br>**15%** coinsurance with Tier 1 Providers and freestanding facilities | **40%** | **$35** copay primary care<br>**$20** copay for Tier 1 Provider primary care | **40%** | **$0** copay primary care | **50%** |
| **Specialty Visit** | **20%**<br>**15%** coinsurance with Tier 1 Providers and freestanding facilities | **40%** | **$50** copay specialist visit<br>**$35** copay specialist Tier 1 Provider | **40%** | **$50** copay specialists (no deductible) | **50%** |

[1] For out-of-network services, your medical plan option pays based on the reasonable and customary (R&C) charge. You're responsible for any amounts that exceed the R&C charge, even after you reach your out-of-pocket maximum.

[2] Using Tier 1 Providers and freestanding facilitates is optional. The Tier 1 designation helps you find providers known for offering the best combination of quality and cost. (The availability of Tier 1 Providers varies by location.) Freestanding facilities are outpatient, diagnostic, or ambulatory centers, or independent laboratories in the Choice Plus network that perform services and submit claims as freestanding entities and not as hospitals.

[3] If you have other family members on the policy, the overall family deductible must be met before the plan begins to pay.

# MEDICAL PLANS (CONT.)

| | Broad Access HSA | | Broad Access | | High-Performance (Eastern Wisconsin) | |
|---|---|---|---|---|---|---|
| | In-Network | Out-of-Network[1] | In-Network | Out-of-Network[1] | In-Network | Out-of-Network[1] |
| **Network** | UnitedHealthcare (UHC) | | UnitedHealthcare (UHC) | | Centivo | |
| **What You Pay After You Meet Your Deductible[2]** | | | | | | |
| **Virtual Visits** | **20%** | **Not covered** | **20%** | **Not covered** | **$0** | **$0** copay primary care |
| **Hospitalizations** | **20%** | **40%** | **20%** | **40%** | **$100** copay nonsurgical<br>**$800** copay surgical | **50%** |
| **Diagnostic Tests** | **20%**<br>**15%** at freestanding facilities | **40%** | **20%**<br>**15%** at freestanding facilities | **40%** | **$0** office<br>**$50** outpatient | **50%** |
| **Emergency Room** | **20%** | **20%** | **$50** copay for urgent care/**$250** copay for ER[3] | **$50** copay for urgent care/**$250** copay for ER[3] | **$50** copay for urgent care/**$250** copay for ER[3] (no deductible) | **$50** copay for urgent care/**$250** copay for ER[3] |

[1] For out-of-network services, your medical plan option pays based on the reasonable and customary (R&C) charge. You're responsible for any amounts that exceed the R&C charge, even after you reach your out-of-pocket maximum.

[2] Using Tier 1 Providers and freestanding facilitates is optional. The Tier 1 designation helps you find providers known for offering the best combination of quality and cost. (The availability of Tier 1 Providers varies by location.) Freestanding facilities are outpatient, diagnostic, or ambulatory centers, or independent laboratories in the Choice Plus network that perform services and submit claims as freestanding entities and not as hospitals.

[3] The $250 copay for an emergency room visit is waived if you're admitted to the hospital.

# WHAT YOU PAY FOR MEDICAL

(Annual Contributions)

## You Only

| Your Annual Benefits Pay[1] | Broad Access HSA | | Broad Access | | High-Performance | |
|---|---|---|---|---|---|---|
| | You Pay | Rockwell Pays | You Pay | Rockwell Pays | You Pay | Rockwell Pays |
| Less Than $50,000 | $664.05 | $9,634.94 | $1,170.66 | $9,916.28 | $877.45 | $9,794.74 |
| $50,000–$75,000 | $1,263.34 | $9,035.65 | $1,990.29 | $9,096.65 | $1,624.93 | $9,047.26 |
| $75,000–$100,000 | $1,622.25 | $8,676.74 | $2,367.87 | $8,719.07 | $1,995.45 | $8,676.74 |
| More Than $100,000 | $2,064.58 | $8,234.41 | $2,852.53 | $8,234.41 | $2,437.78 | $8,234.41 |

## You + Spouse/Domestic Partner

| Your Annual Benefits Pay[1] | Broad Access HSA | | Broad Access | | High-Performance | |
|---|---|---|---|---|---|---|
| | You Pay | Rockwell Pays | You Pay | Rockwell Pays | You Pay | Rockwell Pays |
| Less Than $50,000 | $1,865.99 | $19,761.80 | $3,015.30 | $20,267.27 | $2,352.96 | $20,058.70 |
| $50,000–$75,000 | $3,589.69 | $18,038.10 | $5,244.47 | $18,038.10 | $4,373.56 | $18,038.10 |
| $75,000–$100,000 | $4,637.44 | $16,990.35 | $6,292.22 | $16,990.35 | $5,421.31 | $16,990.35 |
| More Than $100,000 | $5,917.02 | $15,710.77 | $7,571.80 | $15,710.77 | $6,700.89 | $15,710.77 |

[1] Annual benefits pay is defined as annual base pay (or your total compensation if you're a sales employees only) as of your hire date or October 1—whichever is later.

# WHAT YOU PAY FOR MEDICAL

(Annual Contributions)

## You + Children

| Your Annual Benefits Pay[1] | Broad Access HSA | | Broad Access | | High-Performance | |
|---|---|---|---|---|---|---|
| | You Pay | Rockwell Pays | You Pay | Rockwell Pays | You Pay | Rockwell Pays |
| Less Than $50,000 | $1,586.03 | $17,981.99 | $2,540.79 | $18,524.42 | $1,987.07 | $18,290.03 |
| $50,000–$75,000 | $3,049.13 | $16,518.89 | $4,436.02 | $16,629.19 | $3,754.83 | $16,522.27 |
| $75,000–$100,000 | $3,937.08 | $15,630.94 | $5,369.97 | $15,695.24 | $4,646.16 | $15,630.94 |
| More Than $100,000 | $5,021.51 | $14,546.51 | $6,518.70 | $14,546.51 | $5,730.59 | $14,546.51 |

## You + Family

| Your Annual Benefits Pay[1] | Broad Access HSA | | Broad Access | | High-Performance | |
|---|---|---|---|---|---|---|
| | You Pay | Rockwell Pays | You Pay | Rockwell Pays | You Pay | Rockwell Pays |
| Less Than $50,000 | $2,829.98 | $28,066.84 | $4,448.28 | $28,812.70 | $3,513.48 | $28,503.09 |
| $50,000–$75,000 | $5,456.83 | $25,439.99 | $7,809.72 | $25,451.26 | $6,576.58 | $25,439.99 |
| $75,000–$100,000 | $7,057.73 | $23,839.09 | $9,421.89 | $23,839.09 | $8,177.48 | $23,839.09 |
| More Than $100,000 | $9,009.79 | $21,887.03 | $11,373.95 | $21,887.03 | $10,129.54 | $21,887.03 |

[1] Annual benefits pay is defined as annual base pay (or your total compensation if you're a sales employees only) as of your hire date or October 1—whichever is later.

# PRESCRIPTION DRUGS

All medical plans come with prescription drug coverage through Optum Rx. You can go to any pharmacy within the **Optum Rx Pharmacy network**, like Walgreens, CVS, Walmart, and more. Log in to your account to view networks and drug pricing at **optumrx.com**.
Here's what you'll pay for in-network prescription drugs.

| What You Pay[1] | | Broad Access HSA | | Broad Access | | High-Performance | |
|---|---|---|---|---|---|---|---|
| | | In-Network | Mail Order (up to 90-day supply) | In-Network | Mail Order (up to 90-day supply) | In-Network | Mail Order (up to 90-day supply) |
| **Network** | | Optum Rx | | Optum Rx | | Optum Rx | |
| **Deductible** | | Counts toward your medical deductible | Counts toward your medical deductible | **N/A** | **N/A** | **N/A** | **N/A** |
| **Copay/ Coinsurance[2]** | **Generic** | **20%** (after deductible) | **20%** (after deductible)[4] | **$5** copay for maintenance drugs[3] | **$10** copay for maintenance drugs[3] | **$5** copay for maintenance drugs[3] | **$10** copay for maintenance drugs[3] |
| **Preferred Brand** | | **20%** (after deductible) | **20%** (after deductible)[4] | **20%** ($100 max/Rx) | **20%** ($200 max/Rx) | **20%** ($100 max/Rx) | **20%** ($200 max/Rx) |
| **Nonpreferred Brand** | | **20%** (after deductible) | **20%** (after deductible)[4] | **40%** ($120 max/Rx) | **40%** ($240 max/Rx) | **40%** ($120 max/Rx) | **40%** ($240 max/Rx) |
| **Out-of-Pocket Maximum** | | Counts toward your medical out-of-pocket maximum | | Counts toward your medical out-of-pocket maximum | | Counts toward your medical out-of-pocket maximum | |

[1] Your plan includes a broad network of retail pharmacies. See complete plan details for out-of-network retail benefits.

[2] In addition to your copay/coinsurance, you'll also pay the cost difference between the generic and brand-name drug. This doesn't count toward your deductible or out-of-pocket maximum.

[3] Maintenance medications are used to treat long-term and chronic conditions such as high blood pressure, heart disease, asthma, and diabetes. You can find a complete list of maintenance medications on the **Optum Rx website**.

[4] The deductible is waived for designated preventive drugs.

# FIVE WAYS TO SAVE ON PRESCRIPTION DRUGS

Prescription drug coverage automatically comes with your medical plan. So, let's make sure you get the most for your money.

1

## Go Generic (When Possible)

Talk to your doctor about your options.

- **Generics** are drugs that have the same active ingredients and meet the same safety standards as brand-name drugs but without the brand name and expensive price tag.
- **Formulary brands** are brand-name drugs included on your medical plan's formulary at a discounted rate. The formulary is a list of specific prescription drugs (and costs) covered by your medical plan.
- **Nonformulary brands** are brand-name drugs not included on your medical plan's formulary. This means you'll pay the most out of pocket for these medications.

2

## Use a Network Pharmacy

Drug prices at in-network pharmacies are less expensive than out-of-network pharmacies. You save money because you pay a percentage of the lower in-network cost. So stay in network and receive a better price. You can find in-network pharmacies at **optumrx.com**.

3

## Try a 90-Day Supply for Maintenance Drugs

Maintenance drugs are drugs you take on an ongoing basis to treat chronic conditions, such as high cholesterol or high blood pressure.

You may be able to save money by choosing a 90-day supply through mail delivery instead of filling monthly prescriptions. For new maintenance drugs, you'll be allowed two 30-day supplies from any network retail pharmacy before you're asked to receive any additional fills in a 90-day supply from Optum Rx Home Delivery Pharmacy's Mail Service Member Select Program. 90-day supplies are available through mail delivery only and are not available at retail pharmacies. You can opt in or out of the program at any time by calling the Optum Rx Customer Care Center at **1.800.356.3477** or by logging in to your **Optum Rx** account to make your changes.

4

## Use Tax-Free Dollars

If you've signed up for a Health Savings Account (HSA) or a Flexible Spending Account (FSA), you can use that money to pay for your prescription drugs. And remember, it's tax-free and already in your budget, which makes good money sense. If you don't contribute to an HSA or FSA, you may have other options—like discount cards—to help you save money. Ask your pharmacist for details.

5

## Pay $0 for Certain Specialty Medications

If you're enrolled in the Broad Access or High-Performance medical plans and take specialty prescription drugs, you'll be automatically enrolled in the Optum Rx Variable Copay Card Program to get your covered specialty medications at a discounted rate. If you're eligible, Optum Rx will call you directly. For questions, call Optum Rx Specialty Pharmacy at **1.855.427.4682** or by logging in to your Optum Rx account to make your changes.

# HEALTH SUPPORT

Your medical plans include programs and services to help you and your family live a healthier life.

## Health Support Programs—For All Medical Plans

If you're enrolled in **any of the medical plans**, take advantage of these resources that help you find quality care and save money.

### 2nd.MD Medical Experts

Get the right diagnosis and treatment—and avoid unnecessary costs—with the help of 2nd.MD Medical Experts. At no cost to you, you can:

- Work with top specialists to review your medical case and offer recommendations for diagnosis or treatment.
- Ask your medical questions and get expert answers.
- Get the right care for a wide range of medical conditions including cancer, heart disease, digestive issues, mental health, and more.

### Infertility Services

Whether you're thinking about starting a family or need extra support, you receive a medical lifetime maximum of $25,000 and a prescription drug lifetime maximum of $10,000 for an infertility diagnosis and fertility care due to medical necessity. Examples include in vitro fertilization (IVF) to treat infertility and fertility preservation after a cancer diagnosis.

### Fertility, Perimenopause, and Menopause Support

You and your adult dependents enrolled in a Rockwell medical plan have access to Maven. In addition to virtual care for pregnancy, postpartum, and returning to work after parental leave, you have access to unlimited education and coaching from a network of reproductive and family health experts, such as OB-GYNs, doulas, reproductive endocrinologists, fertility educators, adoption/surrogacy coaches, nutritionists, mental health coaches, and career coaches. Maven also provides personalized support for perimenopause, menopause, and post menopause, including managing symptoms and support in finding the right treatments. Plus, you'll be connected to a dedicated Care Advocate who can provide 24/7 support, learning resources, and access to community forums to engage with others on the same journey.

### Autism Spectrum Disorder Support

If you or someone in your family has been diagnosed with autism spectrum disorder, you have coverage for intensive behavioral health services, such as applied behavior analysis (ABA), which is designed to reinforce adaptive behaviors, reduce maladaptive behaviors, and improve age-appropriate skills.

### GET PERSONALIZED SUPPORT

Call **1.877.687.7272** if you need assistance with understanding your benefits, resolving claims issues, and more. You can use Personal Advocate even if you're not enrolled in a Rockwell medical plan.





# HEALTH SUPPORT (CONT.)

## UHC Health Support Programs

If you're enrolled in the Broad Access HSA or Broad Access medical plan option through UnitedHealthcare (UHC), you have access to even more health support programs.

### Same-Day Virtual Visits

Health concerns don't always follow a 9-to-5 schedule. Fortunately, registered nurses are on call 24/7 to answer your health questions, understand your health concerns, and give general health tips. You can also schedule same-day urgent care visits, so you can talk with a provider anytime for common urgent care needs or when your primary care provider (PCP) isn't available.

### Freestanding Facilities

A freestanding facility performs outpatient services and submits claims separately from your hospital. Depending on your plan, you may have a lower copay or no copay at all when you visit a freestanding network facility or provider office instead of a hospital. When you need lab tests, radiology, or outpatient surgery outside of your doctor's office, visit **myuhc.com** and choose a facility that is marked as "freestanding facility" to help reduce your out-of-pocket costs.

### MyClaims Manager

You can follow your claims from start to finish and track payments you've made to your health care providers using myClaims Manager from the homepage of **myuhc.com** or through the UnitedHealthcare mobile app.

### Real Appeal Weight Loss

If you want to lose weight but aren't sure where to start, we offer a program that can help. Real Appeal is an online weight loss program that teaches you simple repeatable skills to help you lose weight—and keep it off.

### One Pass Select

Access a healthier lifestyle through the One Pass Select™ fitness and well-being network. Use your Health Safe ID at **onepassselect.com** to see your subscription options for premium gyms, well-being apps, and grocery delivery through Walmart and Shipt.

# HEALTH SUPPORT (CONT.)

## Centivo High-Performance Plan

If you live in Eastern Wisconsin and are enrolled in the **High-Performance** medical plan option through Centivo, you have access to even more health support programs. Visit **ra.centivo.com** to learn more.

### Virtual Primary Care

Offers virtual primary care for preventive services and minor procedures, lab work, and physical therapy evaluations and follow-up.

### Mental Health Support

Get help with finding in-network licensed therapists covered by your Centivo medical plan with Rula. They'll provide you with options that fit your unique needs along with a detailed cost estimate before your first session.

### Virtual Speech Therapy for Children and Adults

Reach your speech-language goals from the comfort of your home with the support of a licensed speech therapist.

### Hypothyroidism Support

Get support from expert thyroid doctors at Paloma Health with managing hypothyroidism and Hashimoto's disease from home (with a referral from your doctor). Paloma Health uses a combination of at-home test kits, personalized care plans, and symptom tracking to explore all possible treatments.

### Muscle and Joint Injury Support

Speak to an Upswing Health expert health care professional to identify any orthopedic injury or condition and determine the best treatment—whether through virtual visits, home-based therapies, or referrals to in-network specialists.



# DENTAL

Choose between two plans that each cover in-network preventive care and cleanings at 100%. You can visit any dentist you'd like, but visiting a Delta Dental PPO or Premier dentist will save you money by staying in network. To find in-network dental providers or to access your Delta Dental ID card, visit member.deltadentalwi.com or call **1.800.236.3712**.

| | Basic | Comprehensive |
|---|---|---|
| **Network** | **Delta Dental PPO Plus Premier** | **Delta Dental PPO Plus Premier** |
| **Deductible** | | |
| You Only | **$50** | |
| You + Family | **$150** | |
| **Preventive Services** (exams, cleanings, sealants, X-rays) | **$0** | **$0** |
| **Basic Services** (extractions, fillings, root canals) | **30%** (after deductible) | **20%** (after deductible) |
| **Major Services** (crowns, dentures, bridges) | **Not covered** | **50%** (after deductible) |
| **Orthodontia** | **Not covered** | **50%**, up to the lifetime maximum of $2,000 |
| **Temporomandibular Joint (TMJ) Dysfunction** | **Not covered** | **50%**, up to the lifetime maximum of $2,000 |
| **Benefit Maximums**[1] | **$1,500** per person | **$2,000** per person |

## WHAT YOU PAY FOR DENTAL
(Annual Contributions)

| | Basic | | Comprehensive | |
|---|---|---|---|---|
| | You Pay | Rockwell Pays | You Pay | Rockwell Pays |
| **You Only** | **$23.40** | **$317.28** | **$244.80** | **$291.26** |
| **You + Spouse/ Domestic Partner** | **$45.47** | **$711.42** | **$551.39** | **$656.02** |
| **You + Child(ren)** | **$45.47** | **$711.42** | **$551.39** | **$656.02** |
| **You + Family** | **$67.54** | **$926.99** | **$736.38** | **$876.12** |

[1] You're responsible for any amounts that exceed the limit indicated.



### USE PRE-TAX DOLLARS FOR EXPENSES

Consider using a Flexible Spending Account (FSA) to set aside pre-tax dollars for eligible dental and vision expenses. There are lots of ways to maximize your savings by using an FSA—learn more on **page 20**.

## SAVE EXTRA ON VISION CARE

If you don't want to enroll in the vision plan, you and your family can still use the **MetLife VisionAccess Discount program** to get discounted prices on eye exams, lenses, frames, nonprescription sunglasses, and laser vision correction—at no cost to you.



## COVERING YOUR CHILD?

If you're enrolled in the vision plan, children (under age 13) can receive a second eye exam during a plan year. And, if their vision prescription changes by a certain amount in a plan year, they may get their new pair of glasses and frames covered. Plus, polycarbonate lenses—which are 10 times stronger than plastic or glass lenses—are covered for no extra cost.

# VISION

The vision plan is administered by UnitedHealthcare (UHC) and includes eye exams, frames, lenses, and contacts. To find network providers in the UHC vision plan and learn more, visit myuhcvision.com or call **1.800.638.3120**.

**Important!** The UHC vision plan is separate from the medical plans.

| | In-Network | Out-of-Network |
|---|---|---|
| **Network** | **UHC Choice Plus Spectera Vision** | **N/A** |
| **What Your Vision Plan Pays** | | |
| **Eye Exam** (once every 12 months) | **$20** copay, then **100%** | Up to **$40** |
| **Frames** (once every 24 months) | **$20** copay, then **100%,** up to **$150**, then **30%** off over **$150** | Up to **$45** |
| **Lenses** (once every 12 months) | **$20** copay, then **100%** | Up to **$80** |
| **Elective Contact Lenses** (once every 12 months) | **$20** copay | |
| • Covered selection contacts | Up to **6 boxes** | Up to **$15** |
| • Nonselection contacts | Up to **$150** | Up to **$150** |
| • Necessary contacts | **100%** | Up to **$210** |
| **Laser Vision Discount**[1] | **15%** off standard prices or **5%** off promotional prices | |

[1] Must use providers in the Laser Vision Network of America.

## WHAT YOU PAY FOR VISION

(Annual Contributions)

| | Vision Plan |
|---|---|
| | You Pay |
| **You Only** | **$64.56** |
| **You + Spouse/Domestic Partner** | **$119.40** |
| **You + Child(ren)** | **$149.16** |
| **You + Family** | **$208.80** |

# TAX-ADVANTAGED ACCOUNTS

**THINKING ABOUT AN HSA?**

If you're a new hire or changing your benefits due to a qualifying life event, keep in mind that HSA elections can't be made as of December 1 for the same calendar year.

We offer several types of accounts to help you save for the future and take advantage of tax benefits while paying for necessary expenses—health care, childcare, elder care, and more.

**If you enroll in the Broad Access HSA**, you'll receive an enrollment kit from HealthEquity. While you wait, visit **learn.healthequity.com/rockwell/hsa** or download the HealthEquity Mobile app to start making use of the tools and resources. If you have questions, call HealthEquity at **1.866.346.5800**.

| | Health Savings Account (HSA) | Health Care Flexible Spending Account (HCFSA) | Limited Purpose Flexible Spending Account (LPFSA) | Dependent Care Flexible Spending Account (DCFSA) |
|---|---|---|---|---|
| **Administrator** | **HealthyEquity** | **Smart-Choice** | **Smart-Choice** | **Smart-Choice** |
| **Eligibility** | **Broad Access HSA** | **Broad Access** or **High-Performance** | **Broad Access HSA** | You don't need to be enrolled in a medical plan to use this account. |
| **Rockwell Contribution** | You Only: **$500**<br>You + Family: **$1,000** | **N/A** | **N/A** | Rockwell will match your contribution dollar for dollar, up to **$1,000**. |
| **2026 Annual IRS Contribution Limit**[1] | You: Up to **$4,400**<br>Family: Up to **$8,750**<br>Age 55+: Up to an additional **$1,000**<br>You can change how much you contribute at any time by visiting **Your Benefits™**. | Up to **$3,400**<br>You can't change how much you contribute during the year without a qualifying life event.[2] | Up to **$3,400**<br>You can't change how much you contribute during the year without a qualifying life event.[2] | **$3,750**—single or married filing federal taxes separately; **$7,500**—married filing jointly or single filing as head of household.<br>You can't change how much you contribute during the year without a qualifying life event.[2] |
| **What You Can Use the Money For** | Qualified medical, prescription drug, dental, and vision expenses. Keep your receipts in case of an IRS audit. | Qualified medical, prescription drug, dental, and vision expenses. You must submit formal receipts to substantiate some purchases. | Qualified medical, preventive prescription drug, dental, and vision expenses. You must submit formal receipts to substantiate some purchases. | Qualified child and elder care expenses such as daycare, summer camp, before- or after-school programs, and more. |
| **What Happens to Unused Money** | It rolls over from year to year and stays with you wherever you go, even if you leave Rockwell. As your account grows, you'll be able to invest the money and possibly earn interest too. Since this money is 100% yours and grows over time, you can use it as a retirement savings vehicle for eligible retiree medical expenses down the road. | You lose any money over $680 left in your account at the end of the year. However, you can submit a claim through March 31 of the following calendar year for expenses incurred in the prior year. | You lose any money over $680 left in your account at the end of the year. However, you can submit a claim through March 31 of the following calendar year for expenses incurred in the prior year. | You lose any money left in your account at the end of the year. However, you can submit a claim through March 31 of the following calendar year for expenses incurred in the prior year. |

[1] If you had an HSA at your previous employer, make sure you account for what you contributed and don't forget Rockwell's contribution counts toward your annual limit. Your total contributions to all plans—including your spouse's/domestic partner's plan—shouldn't exceed the contribution limit for the calendar year.

[2] Changes to the IRS contribution limits are updated and communicated annually. IRS contribution limits are updated in the fall.

# PROTECTION

- LIFE AND AD&D
- DISABILITY
- TRAVEL ACCIDENT AND MEDICAL
- EXTRA BENEFITS



# LIFE AND AD&D

Life is unpredictable. Make sure the ones you love are protected—even if you can't be there. Coverage is through MetLife.

## Basic Life Insurance

This insurance pays a benefit to your dependent if you die. As a benefits-eligible employee, you're automatically enrolled in Basic Life Insurance at no cost to you. Each year, any Basic Life Insurance you receive over $50,000 will be reported as imputed income based on IRS regulations. You also have the option to enroll in a flat $50,000 of Basic Life Insurance, which helps you avoid imputed tax income through the IRS.

## Supplemental Life Insurance

In addition to your company-paid Basic Life insurance, you can buy Supplemental Life Insurance through MetLife for yourself, your spouse/domestic partner, and your children (up to age 26) through after-tax payroll deductions.

Supplemental Life Insurance contributions are based on your coverage amount, age, and smoker status. Visit **raquickfind.com** to calculate what you'll pay per paycheck.

If you're enrolled in Supplemental Life Insurance, you get access to will preparation services at no cost to you—allowing you to work with an attorney or rely on the digital experience to prepare a will, create and sign tamper-proof electronic documents, and start a video chat with a notary and witnesses. To get started, visit **willscenter.com** and log in using your MetLife account information.

## Supplemental AD&D Insurance

Supplemental Accidental Death and Dismemberment (AD&D) Insurance offers financial protection if you're seriously injured or die as a result of a covered accident. This benefit is paid to you if you're injured or to your beneficiary if you die. You can buy Supplemental AD&D Insurance for yourself, your spouse/domestic partner, and your children through after-tax payroll deductions.

**DON'T FORGET ABOUT YOUR BENEFICIARIES!**

Be sure to designate a beneficiary by visiting **Your Benefits™**.

**NEW IN 2026!**

**BE READY TO DESIGNATE YOUR DEPENDENTS**

In 2026, you'll need to confirm which dependents should be covered to help ensure that only eligible dependents are enrolled. Be prepared to provide their information during enrollment.

| | Basic Life Insurance<br>Rockwell Pays |
|---|---|
| **You Only**[1] | **2x** your annual benefits pay[3]<br>(minimum coverage level of $150,000) |

| | Supplemental Life Insurance |
|---|---|
| **You Only**[2] | **1x–8x** your annual benefits pay[3]<br>($2,000,000 maximum) |
| **Spouse/Domestic Partner**[2] | **$10,000–$100,000**<br>(in $5,000 increments) |
| **Child(ren)** | **$5,000** or **$10,000** per child |

| | Supplemental AD&D Insurance |
|---|---|
| **You Only**[2] | **1x–8x** your annual benefits pay[3]<br>($2,000,000 maximum) |
| **Spouse/Domestic Partner**[2]<br>• Spouse/Domestic Partner Only<br>• Spouse/Domestic Partner + Child(ren) | **60%** of your benefit amount<br>**50%** of your benefit amount |
| **Child(ren)**<br>• Child(ren) Only<br>• Spouse/Domestic Partner + Child(ren) | **20%** of your benefit amount<br>**15%** of your benefit amount<br>(up to $40,000 for child coverage) |

[1] Evidence of Insurability (EOI), or proof of good health, isn't required for Basic Life. The value of your Basic Life Insurance coverage above $50,000 is considered taxable income by the IRS and will be added to your W-2 at year-end.

[2] Evidence of Insurability (EOI), or proof of good health, may be required before your Supplemental Life Insurance goes into effect.

[3] Annual benefits pay is defined as annual base pay (or total compensation for sales employees) as of your hire date or October 1—whichever is later.

# DISABILITY

The loss of income due to illness or injury can cause serious financial hardship for your family. Disability insurance replaces a portion of your income to help you continue paying your bills and meeting your financial obligations during this difficult time. Coverage is through Prudential.

## Short-Term Disability

Rockwell Automation provides company-paid Short-Term Disability (STD) coverage, administered by Prudential. The STD plan is designed to provide you with income if you're unable to work due to a non-work-related injury, illness, or other eligible events—including maternity. You don't need to enroll in this benefit.

| | Weeks 1–16 | Weeks 17–26 |
|---|---|---|
| **Your Benefit** | Paid at **100%** annual benefits pay[1] | Paid at **70%** annual benefits pay[1] |

## Long-Term Disability

Long-Term Disability (LTD) can replace part of your monthly benefits pay for an extended period of time if you're disabled for more than 180 days and have received the maximum benefit available under the STD plan. If you don't have the savings you would need to financially support yourself if you couldn't work for at least seven months, consider purchasing one of the two LTD coverage options in the chart to the right to replace 60% of your monthly pay, up to the maximum amount.

| | LTD Option 1 | LTD Option 2 |
|---|---|---|
| **Each Month** | **60%** pay | **60%** pay |
| **Cost of Coverage** | **$0.19** per **$100** of your pay per month | **$0.30** per **$100** of your pay per month |
| **Maximum Payable Benefit** | **$5,000** per month (up to $100,000) | **$15,000** per month (up to $300,000) |
| **Waiting Period** | **180** days (during which you may receive STD) | **180** days (during which you may receive STD) |
| **Cost of Living Allowance** | **None** | Annual adjustment of **3%** for up to 5 years |

[1] Annual benefits pay is defined as annual base pay (or total compensation for sales employees) as of your hire date or October 1—whichever is later.



# TRAVEL ACCIDENT AND MEDICAL

**For protection while traveling on Rockwell-approved company business, we offer resources to keep you and your family safe.**

## Business Travel Accident Insurance

If you're injured or become deceased due to an accident while traveling on Rockwell-approved company business, we'll pay to cover three times your annual salary, up to $200,000 for you and your dependents. To read the policy, sign on to the Rockwell Automation network and visit the **Epoch intranet** website at **rockwellautomation.sharepoint.com/sites/start/pages/home.aspx/home**.

## International SOS Medical and Travel Assistance

Rockwell Automation has partnered with International SOS (ISOS) to provide medical and security assistance when employees travel outside their home country for Rockwell Automation business. ISOS provides traveling employees and expatriates with worldwide emergency assistance services 24 hours a day, 365 days a year. During an emergency situation, ISOS will act in concert with you and your corporate authorized contact person as needed to monitor events in the country or region of concern, to analyze the situation and, if necessary, assist in formulating and carrying out an action plan, including payment of medical expenses if necessary.

If you require emergency assistance while traveling on Rockwell Automation business, you can call International SOS Rockwell Automation Global Security at **1.800.523.6586** and your home country's embassy or consulate.

# EXTRA BENEFITS

Get extra protection for yourself, your family, and your best buds.

## Legal Plan

Visit **Your Benefits™** at **digital.alight.com/rockwellautomation** to enroll in the MetLife Legal Plan for **$162** annually on an after-tax basis. This plan connects you with skilled attorneys who can help you manage anything from estate planning, buying and selling a home, traffic ticket defense, adoption, protection against domestic violence, and more. To learn more, visit **legalplans.com/why-enroll** or call MetLife Legal Plans at **1.800.821.6400**.

## Pet Insurance

Rockwell provides health care for all family members —even the four-legged ones. Consider enrolling in Pet Insurance through MetLife to visit any licensed veterinarian in the U.S. and receive discounted rates on routine care, lab fees, surgeries, and other pet medical expenses. To enroll and start paying for coverage through after-tax payroll deductions, call MetLife at **1.800.438.6388** or visit **mybenefits.metlife.com**.

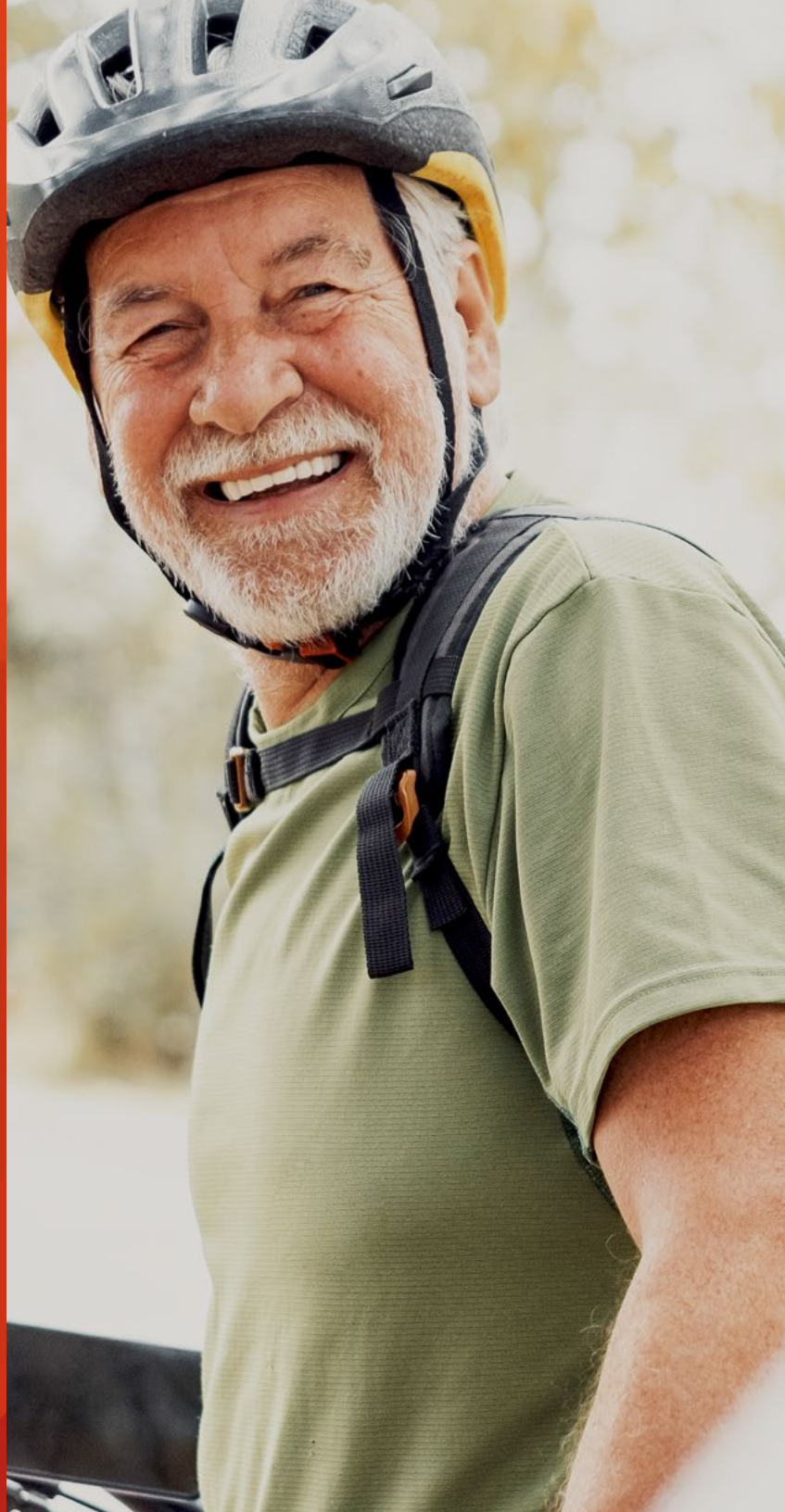
## Auto and Home Insurance

MetLife provides group discounts on auto and home insurance through Farmers Insurance Group. It offers customized policies to fit your needs and budget. To enroll and start paying for coverage through after-tax payroll deductions, call MetLife through Farmers Insurance Group at **1.800.438.6388** or visit **mybenefits.metlife.com**.



# RETIREMENT

- HOW THE PLAN WORKS
- CONTRIBUTIONS
- ENROLLMENT
- INVESTMENT MANAGEMENT
- LEARNING RESOURCES



# HOW THE PLAN WORKS

The Rockwell Automation Retirement Savings Plan—the 401(k) plan—is an easy, tax-friendly way to help you save for your retirement. Your contributions and Rockwell's contributions to your Retirement Savings Account work together to help you achieve your goals. You contribute a portion of your paycheck into your account and Rockwell enhances your savings by making additional contributions. The 401(k) plan is administered by Fidelity.



## Here's How the Retirement Savings Plan Works

Meet Mateo. He's a 43-year-old full-time employee at Rockwell Automation with a hire date of October 26, 2020. He wants to save and invest a piece of his paycheck before taxes are taken out. He knows that Rockwell matches $0.50 for every $1.00 he contributes up to 7%—and he doesn't want to leave money on the table—so he contributes 7% of his eligible pay. Also, Mateo's age plus service make him eligible to receive a 4% non-elective contribution (NEC).

**Mateo contributes 7% of his pay into the 401(k) plan.**

You can contribute up to 50% of your pay on a pre-tax, Roth, or after-tax basis. If you're age 50 or older, you're also eligible to make catch-up contributions. You're immediately 100% vested in your own contributions to the plan. See page 28 for annual limitations on contributions.

**7%**

+

**Rockwell matches Mateo's contribution.**

Rockwell Automation contributes $0.50 for every $1.00, up to the first 7% of pay you contribute each paycheck on a pre-tax, Roth, or after-tax basis. Catch-up contributions aren't eligible for the company match. You're 100% vested in the company matching contributions after three years of service.

**3.5%**

+

**Rockwell contributes an additional 4% of Mateo's eligible pay for the NEC.**

Once a year, Rockwell Automation automatically contributes 3%–7% of your eligible pay, called a non-elective contribution (NEC). You're 100% vested in the annual NEC after three years of service. See page 29 to learn more about the NEC.

**4%**

=

**Total annual savings: 14.5% between Rockwell and Mateo.**

**14.5%**

This is a hypothetical illustration to show the value of combined percentages. This hypothetical illustration isn't intended as a projection or prediction of future investment results or as financial planning or investment advice. This illustration doesn't include any charges, expenses, or fees that may be associated with your plan.

# CONTRIBUTIONS

It's never too early or too late to start preparing for retirement. You and Rockwell Automation contribute money today to cover your expenses during retirement. You can save and invest a piece of your paycheck before and/or after taxes are taken out.

## Your Contributions

There are three types of 401(k) contributions—pre-tax, Roth, and after-tax. You can enroll in one or all three, and you can start, stop, or change your contributions anytime. You can contribute up to the IRS limit ($24,500 in 2026). Your elections and changes will be effective as soon as administratively feasible following the date you enroll or make a change.

**NEW IN 2026!** If you're turning 50 or older in 2026 and your total 2025 FICA wages were over $150,000, any catch-up contributions you make in 2026 must be made as Roth contributions. If you're between ages 60 and 63, starting in 2026, you'll be able to contribute even more money into your 401(k) to boost your retirement savings.

| | Pre-Tax | Roth | After-Tax |
|---|---|---|---|
| **What It Is** | Contributions are deducted from your paycheck before taxes, reducing your taxable income and the taxes you pay now. | Contributions are deducted from your paycheck after taxes. In other words, your taxable income isn't reduced by the amount of your contribution. | Contributions are deducted from your paycheck after taxes. In other words, your taxable income isn't reduced by the amount of your contribution. |
| **2026 Contribution Limit** | **$24,500**<br>($32,500 contribution amount for 50 or older[1]) | | **No Specific Limit**<br>(your combined 2026 contributions along with Rockwell contributions can't exceed $72,000 or $80,000 if you're age 50 or older[1]) |
| **Eligible for Company Match** | **Yes** | **Yes** | **Yes** |
| **How Your Account Grows** | **Tax deferred**,<br>any type of pre-tax contributions (including pre-tax catch-up and rollover contributions) and investment earnings on those contributions are taxable to you when you take an eligible distribution. | **Tax-free**,<br>any type of Roth after-tax contributions (including Roth catch-up and rollover contributions) and investment earnings on those contributions are NOT taxable to you when you take an eligible distribution. | **Tax-free/deferred**,<br>any type of regular after-tax contributions (including rollover contributions) aren't taxable to you when you take an eligible distribution. However, the investment earnings on those contributions are taxable to you. |

This material is intended to provide information only. This material isn't intended as advice or recommendation about investing or managing your retirement savings. By sharing this information, Rockwell Automation isn't acting as your fiduciary as defined by the Department of Labor or otherwise. If you need investment advice, please consult with a qualified professional before relying solely on these ideas.

[1] Beginning in 2026, if you're 60–63 years old, your catch-up limit will increase up to a total of $11,250 or 150% of the standard catch-up limit (whichever is greater).

# CONTRIBUTIONS (CONT.)

## Company Matching Contribution

Rockwell Automation matches $0.50 for every $1.00 on the first 7% of pay you contribute each pay period on a pre-tax, Roth, or after-tax basis. Catch-up contributions aren't eligible for company match. Contribute at least 7% to take full advantage of the company match. If you're contributing less than 7% you may be missing out on free money.

## Rockwell's Annual NEC Contribution

Once a year, Rockwell Automation automatically contributes 3%–7% of your eligible pay, called a non-elective contribution (NEC). When we say "pay" for NEC, we mean your actual calendar-year. This includes your regular salary, overtime, shift differentials, bonuses, commissions, and sales incentives. To receive this NEC, you must be employed on the last business day of the calendar year.
For more information, visit **raquickfind.com** and search "**non-elective employer contribution**."

| **Total Points** (Age + Years of Service as of Dec. 31) | **Percentage of Pay Contributed as NEC** |
|---|---|
| **<40** | **3%** |
| **40–59** | **4%** |
| **60–79** | **5%** |
| **80+** | **7%** |

**Important!** After three years of service at Rockwell Automation, you're 100% vested in the Rockwell contributions (company match and NEC). If you were an employee of a company acquired by Rockwell Automation, your service with that acquired company will count toward vesting and your NEC points. If you leave Rockwell before then, you forfeit the Rockwell contributions.



### DID YOU PARTICIPATE IN A 401(K) AT A PREVIOUS COMPANY?

If you were hired within the year, be sure to calculate any pre-tax and Roth contributions you made to your previous retirement plan before deciding your contribution percentage to ensure you're within the pre-tax and Roth annual limits **($24,500 for 2026).** You may want to consider after-tax contributions in your year of hire. Your account balance within other employer plans, like a 401(k), 403(b), or 457(b) can be rolled into the Retirement Savings Plan. Contact the Rockwell Automation Service Center at Fidelity at **1.877.ROK.401K** (**1.877.765.4015**) for details.



# ENROLLMENT

Beginning your second week of employment, visit 401k.com and select the "Enroll" button. After you log in to your account on 401k.com, here's what you need to do:

## Consider

**electing a 7% contribution rate**, if you're financially able, to take advantage of Rockwell's matching contribution.

## Select

**the type of 401(k) contribution**. There are three types of 401(k) contributions—pre-tax, Roth, and after-tax. You can enroll in one or all three, and you can start, stop, or change your contributions anytime.

## Determine

**investments that are right for you**. Everyone invests a little differently. Use the Fidelity tools to help you determine which plan investments fit with your investor style and consider using investment management services through Edelman Financial Engines. See page 31 for more details.

## Add

**beneficiaries through Fidelity** and make sure they are up to date at all times. If there's no beneficiary on record, plan rules will apply to any distribution after death.

## Review

**and confirm your choices**.

### WHAT HAPPENS IF YOU DON'T ENROLL?

**Automatic Enrollment:** If you don't make any elections, you'll automatically be enrolled at a 3% pre-tax contribution rate after 30 days of employment. If you don't want to participate in the plan, consider opting out of automatic contributions and change your contribution rate to 0% by the date noted on the notification letter. Keep in mind that contributions made to the Retirement Savings Plan can't be refunded to you.

**Automatic Increase:** Each January, your contribution rate will automatically increase by 1% until you reach 7% unless you opt out of this feature.

**Automatic Spillover:** If you reach the IRC pre-tax and Roth 401(k) contribution limit before the end of the year, your contributions will automatically "spill over" or switch to regular after-tax contributions at the same rate you elected for pre-tax and/or Roth 401(k) contributions.

**Default Investment Election:** Your own contributions and any Company contributions will be invested in a default target fund based on your birth date and target retirement date.

# INVESTMENT MANAGEMENT

Investing is how you help your savings grow. Within the Rockwell Automation Retirement Savings plan, you have the flexibility to select from investment options that range from conservative to moderately aggressive. A BrokerageLink option is also available. Depending on how involved you want to be, you can create your own investment strategy or let the professionals handle it for you.

## Edelman Financial Engines

Edelman Financial Engines, an independent investment advisor, provides objective advice to help you make the most of your Retirement Savings Plan. It offers two services—Online Advice and Professional Management—to assist you with your investment needs.

| | I Want to Do It Myself | I Want the Experts to Do It for Me |
|---|---|---|
| **Cost** | No additional charge | Fee-based |
| **What It Is** | Edelman Financial Engines provides **Online Advice** to help you:<br>• Monitor and manage your account by yourself by receiving suggestions from Edelman Financial Engines.<br>• Make your own changes, as needed, for the most effective portfolio.<br>• Create an ongoing strategy on your own by using professional-grade planning tools. | Edelman Financial Engines provides full-service **Professional Management** that will:<br>• Take charge of managing your investments, including monitoring your account(s) and reallocating your funds in your portfolio.<br>• Create a personalized, ongoing strategy to reach your financial goals.<br>• Assist with other aspects of financial planning. |
| **What if I Have a Question?** | Call Fidelity at **1.877.401.5762** and ask to speak to an Edelman Financial Engines advisor who will assist you, or visit **401k.com** and select the Edelman Financial Engines link. | |





# LEARNING RESOURCES

Our commitment to supporting your overall development goes beyond the workplace, and we're dedicated to fostering your financial literacy and understanding. That's why we work with Fidelity—your 401(k) vendor—to offer a variety of resources and support to help you confidently navigate your financial future.

## Fidelity Resources

Visit **401k.com** or call **1.877.765.4015** to speak to a Fidelity representative about the tools and resources available to you, including:

- **Live financial education webinars and one-on-one virtual consultations** with experienced Fidelity representatives to help you reach your financial goals. Be on the lookout for monthly emails from Fidelity with information and registration links for upcoming events.
- **Financial planning tools** and information, such as a contribution calculator, take-home pay calculator, and online workshops.
- **The Summary Plan Description (SPD)** to find all the information you need to know about contributions and how the Rockwell Automation Retirement Savings Plan works.

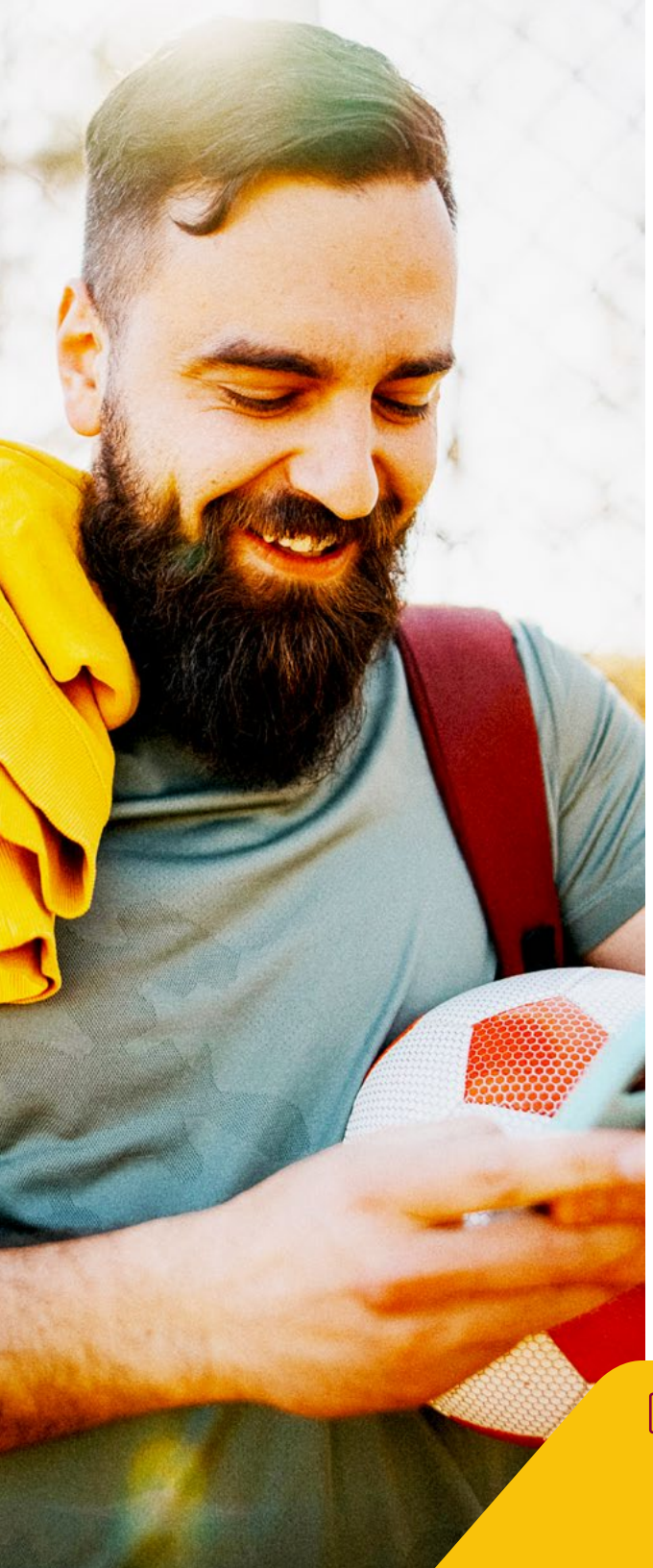
As a Rockwell employee, you also have exclusive access to:

- **RA Quick Find**. Visit **raquickfind.com** to learn all about your retirement benefits, use the Retirement Planning Tool, and more.
- **Rockwell Automation Service Center (RASC) at Fidelity**. For questions, call **1.877.ROK.401K** (**1.877.765.4015**).

# LIFE

- EMOTIONAL SUPPORT
- FAMILY SUPPORT
- TIME OFF AND HOLIDAYS
- DISCOUNTS AND PERKS





# EMOTIONAL SUPPORT

## Calm Mobile App

The Calm mobile app helps you reduce stress, improve sleep, and increase relaxation through meditations, music, Sleep Stories, Masterclasses, and quick movement sessions. You can listen to content from over 350 narrators, including Lebron James, Matthew McConaughey, and Jay Shetty—to name a few. Plus, the content is available in seven languages, including Spanish and French.

Here's how you can get started:

- Listen to Calm Music or Masterclasses on your commute.
- Try the Daily Move to quickly relieve muscle tension after work.
- Listen to a Meditation to help manage stress and anxiety.
- Turn on a Sleep Story to improve your sleep quality.
- Take a break during your workday with the Dailies—short, daily content featuring mindfulness experts.

You and up to five of your dependents can use the Calm mobile app Premium membership—at no cost to you. Register for Calm by visiting **calm.com/b2b/rockwell-automation/subscribe** and using your Rockwell Automation email address.

## ComPsych Employee Assistance Program

The ComPsych Employee Assistance Program (EAP) gives you and your household members 24/7 access to free confidential support for most personal, financial, mental health, work-related, and well-being questions and challenges you may be facing. The EAP can help with:

- Life changes
- Relationships
- Work-life balance
- Parenting and family concerns
- Personal growth and development
- Managing finances
- And more!

The EAP offers **eight free counseling sessions** to you and your household members. To learn more or to talk with a counselor visit **guidanceresources.com/groWeb/login/login.xhtml** (code: **automation**).

### DO YOU LIVE IN WISCONSIN?

If you're enrolled in the Centivo medical plan, you have access to more benefits to support your health and overall well-being. Learn more on **page 17**.

# FAMILY SUPPORT

## Bright Horizons Back-Up Care

School breaks, bad weather, or an elder family member recovering from surgery are just a few examples of times you may need back-up care. Bright Horizons can help when your regular plans fall through. While you're in the U.S., you have a network of qualified, vetted childcare centers as well as in-home care options for children, adults, elderly loved ones, and even pets. Bright Horizons provides two weeks of backup care and exclusive discounts on critical family support services to address challenges that you face throughout all life stages, including:

- Nanny placement services
- Childcare priority at Bright Horizons centers and discounts at partner centers in the U.S.
- Virtual tutoring and homework help
- Elder care planning resources
- Babysitters, pet sitters, housesitters, and care companions

To learn more, visit **clients.brighthorizons.com/rockwell**.

## Tuition Reimbursement

Rockwell Automation recognizes the importance of lifelong learning to maintain its competitive advantage in today's global market. The Educational Assistance program provides up to $12,000 to financially support your future and learning goals.

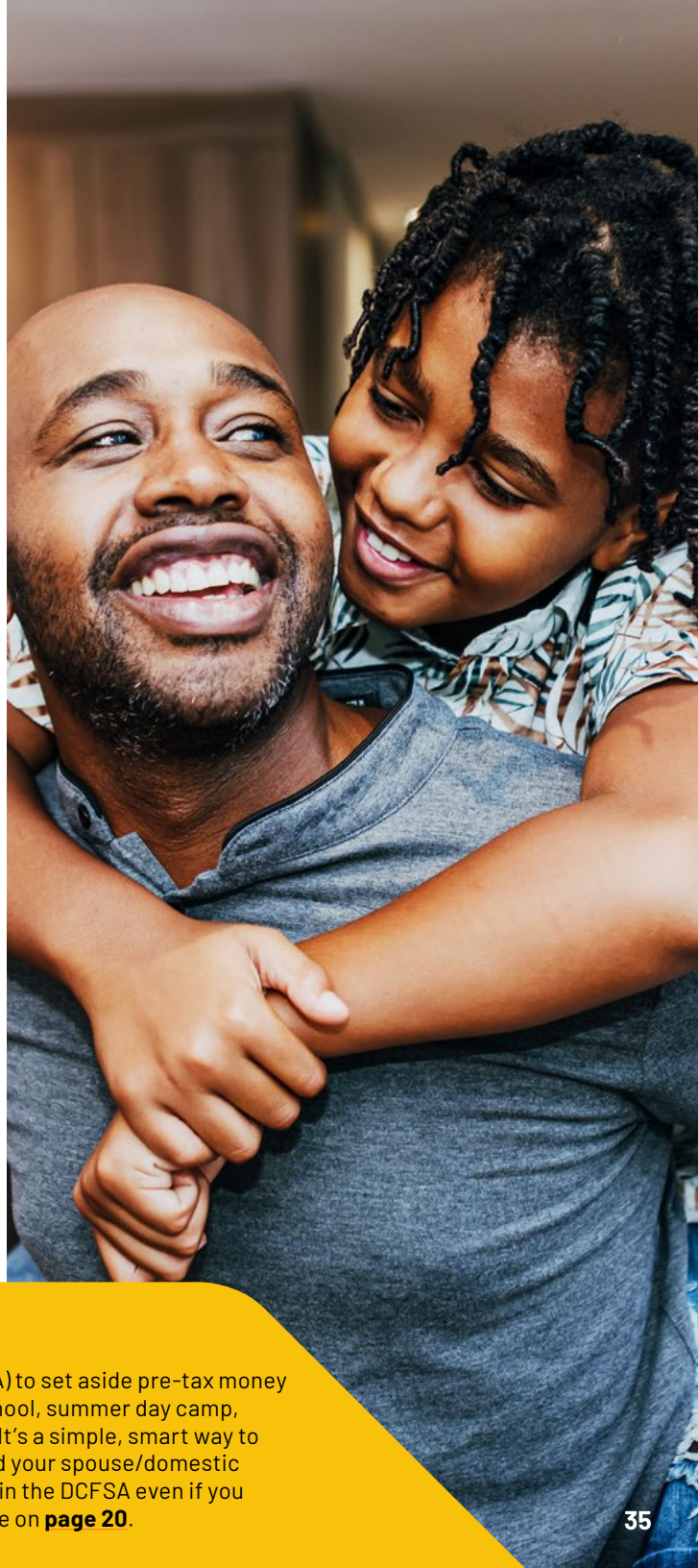
**Important!** It's your responsibility to understand the tax implications based on the current-year IRS guidelines and regulations.

## Adoption Assistance

After working at Rockwell Automation for just one year, you're eligible to receive financial assistance for expenses related to legally adopting a child. To read the policy, sign on to the Rockwell Automation network and visit the **Epoch intranet** website at **rockwellautomation.sharepoint.com/sites/start/pages/home.aspx/home**.

## Legal Services for Reproductive Assistance

If you're enrolled in the Legal Plan through MetLife, you'll have access to up to 20 hours of legal services with an experienced attorney—including phone consultations, court appearances, and document reviews—for reproductive assistance matters such as surrogacy, egg donation, sperm donation, gamete donation, embryo donation, and embryo adoption. These services are 100% covered and there will be no change to your contributions. Visit **digital.alight.com/rockwellautomation** to enroll in the MetLife Legal Plan for $13.50 per paycheck on an after-tax basis. To learn more, visit **legalplans.com/why-enroll** or call MetLife Legal Plans at **1.800.821.6400**.



### USE PRE-TAX DOLLARS FOR EXPENSES

Open a Dependent Care Flexible Spending Account (DCFSA) to set aside pre-tax money to pay for eligible dependent care services, such as preschool, summer day camp, pre- or after-school programs, and child or elder daycare. It's a simple, smart way to save money while taking care of your loved ones so you and your spouse/domestic partner can work or attend school full time. You can enroll in the DCFSA even if you don't have medical coverage through Rockwell. Learn more on **page 20**.

# TIME OFF & HOLIDAYS

We value our employees and their lives outside of work. We have a variety of time off and leave of absence options to help you relax, recover, and take time for the things that matter most.

## Paid Parental Leave

Becoming a parent is an exciting step for families, and Rockwell recognizes the importance of parent-child bonding. While nothing can quite prepare you for those first weeks of parenthood, you receive up to six weeks of paid parental leave to help with the transition. And when you return, you'll receive continued flexibility through our flexible working options so you can deliver your work and meet new family obligations. To read the policy, sign on to the Rockwell Automation network and visit the **Epoch intranet** website at **rockwellautomation.sharepoint.com/sites/start/pages/home.aspx/home**. If you have any questions concerning parental leave, you should contact the HR Service Center at **1.844.404.7247**, Monday and Wednesday, 7 a.m.–7 p.m. Central Time; or Tuesday, Thursday, and Friday, 7 a.m.–5 p.m. Central Time.

## Paid Vacation

The number of paid vacation days you have depends on how long you've worked for Rockwell (prior service with a Rockwell Automation affiliate or service with Rockwell Automation in another country may count). You must be scheduled to work at least 20 hours per week to be eligible for vacation or holiday pay, and your vacation and holidays are prorated.

| Years of Service | Annual Vacation Allowance |
|---|---|
| **Less than 1 Year** | 10 hours per month of service (up to 15 days) |
| **1–4 Years** | 15 days |
| **5–14 Years** | 20 days |
| **15+ Years** | 25 days |

## Caregiver Leave

You can take up to two weeks paid caregiver leave when you care for eligible family members, such as your spouse, child, or parents. If you give birth to or adopt a child, you can use caregiver leave for additional bonding time after your parental leave is exhausted.

You're eligible for caregiver leave if you've worked at Rockwell Automation for 12 months, you're scheduled to work 20 or more hours per week, and you have Federal Family and Medical Leave (FMLA) available to use. The care you provide must be for an eligible family member—not for yourself. To read the policy, sign on to the Rockwell Automation network and visit the **Epoch intranet** website at **rockwellautomation.sharepoint.com/sites/start/pages/home.aspx/home**.

## Volunteer Time Off

Eligible employees can take up to 24 hours of time off annually to volunteer with the approved non-governmental organization (NGO) of their choice through the ROK in Action program. See **page 37** for more details.

## 2026 Holidays

Eligible employees can receive a maximum of 14 designated holidays per calendar year. If you're a part-time employee, your holiday pay is prorated.

- New Year's Day Observed, Jan. 1
- Martin Luther King Jr. Day, Jan. 19
- Memorial Day, May 25
- Independence Day, Observed, July 2–3
- Labor Day, Sept. 7
- Thanksgiving Day, Nov. 26
- Day after Thanksgiving, Nov. 27
- Christmas Eve Day Observed, Dec. 24
- Christmas Day, Dec. 25
- New Year's Eve Observed, Dec. 31
- Three floating holidays

To read the policies and procedures, sign on to the Rockwell Automation network and visit the **Epoch intranet** website at **rockwellautomation.sharepoint.com/sites/start/pages/home.aspx/home**.



# DISCOUNTS AND PERKS

## Save Extra on Vision Care

If you don't want to enroll in traditional vision coverage, you and your family can use the MetLife VisionAccess Discount program to get discount prices on eye exams, lenses, frames, nonprescription sunglasses, and laser vision correction—at no cost to you. To get started, visit **metlife.com/insurance/vision-insurance/visionaccess** or call **1.888.438.6388**.

## ROK in Action

Join our global volunteer program with an online portal to find and sign up for local volunteer opportunities, make monetary contributions, and build a volunteer-focused employee community. ROK in Action is available in 22 languages and includes more than 2 million vetted non-governmental organizations (NGOs) globally. You can match up to $5,000 USD to the approved NGOs of your choice by participating in:

- **Dollars for Doers:** Turn your volunteering hours into rewards dollars.
- **Matching Gift program:** Get your financial contributions matched.

To learn more and participate, visit **rockwell.benevity.org** or download the Benevity mobile app (program domain: rockwell).

# WELL-BEING

› GET REWARDED FOR GETTING HEALTHY



# GET REWARDED FOR GETTING HEALTHY

If you're enrolled in a Rockwell medical plan, you can earn up to $500 off your medical contributions through our voluntary health management program: OnTrack. You'll receive a prorated medical contribution credit each pay period. All program requirements must be completed no later than December 31 of the current year. The credit will be applied the following year.

## How to Earn the $500 Credit

To receive the $500 well-being credit for the next year, you must complete all of the following actions by December 31 of the current year:

**Register for OnTrack**

To get started, visit **enroll.personifyhealth.com**.

Once you've registered, visit **login.personifyhealth.com**.

If you're a new hire, visit **enroll.personifyhealth.com** to register. As long as you're hired before Nov. 30, you're eligible to earn the incentives.

**Get a Health Screening** ($100)

Get a health screening (and meet all health targets) by visiting:

- A Rockwell onsite health screening event if available, or
- A Quest lab (screenings can be scheduled through **login.personifyhealth.com**), or
- Your doctor

**Complete the Health Survey** (2,500 points)

Visit **login.personifyhealth.com**, click on the "Health" tab, and complete the health survey to receive personalized focus areas and activities. Plus, you'll earn 2,500 platform points!

**Do Activities** (up to $400)

Earn $100 for each level by completing health activities:

- Daily health tips—like stretching between meetings or reducing screen time before sleeping
- Track your movement, eating, and sleeping habits
- Health coaching
- Weight loss programs
- Steps and walking challenges
- Community athletic events—like completing a 5k or attending a group exercise class

Log your activities manually into **login.personifyhealth.com** or automatically with your fitness device.



# CONTACTS



# CONTACTS

| | Provider | Telephone | Website/Email |
|---|---|---|---|
| **Enroll** | | | |
| **Enrollment Portal** | **Your Benefits™** | | digital.alight.com/rockwellautomation |
| **Enrollment Questions** | **Rockwell Alight Service Center (RASC)** | **1.877.687.7272** | |
| **Benefit Website** | **RA Quick Find** | | raquickfind.com |
| **Health** | | | |
| **Medical** | **Centivo** | **1.833.502.2403** | my.centivo.com |
| | **2nd.MD** | **1.866.269.3534** | start.2nd.MD/rockwell |
| | **UnitedHealthcare (UHC)**<br>Group #: 904936 | **1.844.234.7924** | welcometouhc.com/rockwellautomation<br>myuhc.com (after you enroll) |
| **Prescription Drugs** | **Optum Rx** | **1.855.295.1223**<br>**1.800.356.3477** | optumrx.com |
| **Tax-Advantaged Accounts: HSA** | **HealthEquity** | | learn.healthequity.com/rockwell/hsa |
| **Tax-Advantaged Accounts: FSAs** | **Alight Smart-Choice Accounts**<br>(Your Benefits™) | **1.877.687.7272** | digital.alight.com/rockwellautomation |
| **Dental** | **Delta Dental** | **1.800.236.3712** | member.deltadentalwi.com |
| **Vision** | **UHC Choice Plus Spectra Vision** | **1.800.638.3120** | myuhcvision.com |

# CONTACTS (CONT.)

| | Provider | | Telephone | Website |
|---|---|---|---|---|
| **Protection** | | | | |
| **Life and AD&D** | **Your Benefits™** | | **1.877.687.7272** | digital.alight.com/rockwellautomation |
| **Disability** | **Prudential**<br>Short-Term Disability (STD)<br>Code: 44062 | **Prudential**<br>Long-Term Disability (LTD)<br>Code: 44062 | **1.800.842.1718**<br>**1.877.889.4885**<br>(fax) | |
| **Travel Accident and Medical** | **International SOS** | | **1.800.523.6586**<br>**1.215.245.4707**<br>(outside the U.S.) | myportal.internationalsos.com/WebPortal/MyOrganisation |
| | **Business Travel** | | **1.414.350.8001** | rockwellautomation.sharepoint.com/sites/RAGlobalSecurity/SitePages/Travel-Security.aspx |
| **Extra Benefits** | **MetLife Farmers**<br>Auto and Home Insurance | | **1.800.438.6388** | mybenefits.metlife.com |
| | **MetLife**<br>Pet Insurance | | **1.800.438.6388** | mybenefits.metlife.com |
| | **MetLife**<br>Legal Plans<br>Code: 3210010 | | **1.800.821.6400** | legalplans.com |
| **Retirement** | | | | |
| **Retirement Savings Plan** | **Edelman Financial Engines** | | **1.877.401.5762** | 401k.com |
| | **Fidelity** | | **1.877.765.4015** | 401k.com |
| **Pension** | **Rockwell Automation Pension Plan** | | **1.877.687.7272** | digital.alight.com/rockwellautomation |
| **Pre-65 Retiree Medical** | **Your Benefits™** | | **1.877.687.7272** | digital.alight.com/rockwellautomation |
| **Retirement Planning Support** | **Edelman Financial Engines** | | **1.877.401.5762** | 401k.com |
| | **Retirement Planning Tool** | | | raquickfind.com |

Download the vendor mobile apps from their website. Most apps are also available from the Apple App Store or Google Play.

# CONTACTS (CONT.)

| | Provider | Telephone | Website |
|---|---|---|---|
| **Life** | | | |
| **Emotional Support** | **Calm** | | calm.com/b2b/rockwell-automation/subscribe |
| | **ComPsych Employee Assistance Program**<br>Code: automation | **1.844.206.1068** | guidanceresources.com/groWeb/login/login.xhtml |
| **Family Support** | **Bright Horizons®**<br>Back-up care, tutoring, pet care | | clients.brighthorizons.com/rockwell |
| | **MetLife**<br>Legal Plans<br>Code: 3210010 | **1.800.821.6400** | legalplans.com |
| | **Epoch Intranet**<br>Adoption Assistance<br>Tuition Reimbursement | | rockwellautomation.sharepoint.com/sites/start/pages/home.aspx/home |
| **Time Off and Holidays** | **Leave of Absence (LOA)** | **1.844.404.7247** | leaveofabsence@ra.rockwell.com |
| | **HR Service Center** | **1.844.404.7247** | |
| **Discounts and Perks** | **MetLife**<br>VisionAccess Discount Program | **1.888.438.6388** | metlife.com/insurance/vision-insurance/visionaccess |
| | **ROK in Action** | | rockwell.benevity.org |
| **Well-Being** | | | |
| **Well-Being** | **One Pass Select** | | onepassselect.com |
| | **OnTrack** | **1.888.671.9395** | enroll.personifyhealth.com |