

Amendment 2026

Dear Participant and Beneficiaries,

This amendment describes changes to Corient Services Health and Welfare Benefit Plan ("**Plan**") and supplements the Summary Plan Description ("**SPD**") for the Plan. The effective date of each of these changes is indicated below. You should read this amendment very carefully and retain this document with your copy of the SPD for future reference.

If this summary has been delivered to you by electronic means, you have the right to receive a written summary and may request a copy of this on a written paper document at no charge by contacting the plan administrator.

Refer to your Summary Plan Description (SPD) for details of your benefit plans. If you have questions regarding this modification, contact the Plan Administrator at:

Corient Services LLC
2 South Biscayne Blvd. 32 Floor
Miami, FL 33131
Phone: 416-681-6628

General Plan Information:

Plan Name: Corient Services Health and Welfare Benefit Plan
Plan Number: 501
Plan Sponsor: Corient Services LLC

Amendment – Funding Change:

- Effective Date of Amendment: January 1, 2026
- Summary of Change(s):
 - Medical Benefits will become self-funded remaining with current carrier.

IN WITNESS WHEREOF, and as conclusive evidence of the adoption of the foregoing amendment to the above-named plan, Corient Services LLC has caused this Amendment to be executed in its name and on its behalf.

Corient Services LLC

Signed by:
By: 
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Elizabeth Gambino

Global Head of Total Rewards and HR Operations

3/13/2026 | 15:00 CDT