

## **SUMMARY ANNUAL REPORT**

### **For Occidental College 403(b) Retirement Plan**

This is a summary of the annual report for Occidental College 403(b) Retirement Plan, EIN 95-1667177, Plan No. 002, for period January 1, 2022 through December 31, 2022. The annual report has been filed with the Employee Benefits Security Administration, as required under the Employee Retirement Income Security Act of 1974 (ERISA).

#### **Basic Financial Statement**

Benefits under the plan are provided by insurance and a trust fund. Plan expenses were \$13,471,799. These expenses included \$150,124 in administrative expenses, \$13,249,766 in benefits paid to participants and beneficiaries, and \$71,909 in other expenses. A total of 1,882 persons were participants in or beneficiaries of the plan at the end of the plan year, although not all of these persons had yet earned the right to receive benefits.

You also have the legally protected right to examine the annual report at the main office of the plan (Occidental College, 1600 Campus Road, Los Angeles, CA 90041) 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: Public Disclosure Room, Room N-1513, Employee Benefits Security Administration, U.S. Department of Labor, 200 Constitution Avenue, N.W., Washington, D.C. 20210.

### **Paperwork Reduction Act Statement**

According to the Paperwork Reduction Act of 1995 (Pub. L. 104-13) (PRA), no persons are required to respond to a collection of information unless such collection displays a valid Office of Management and Budget (OMB) control number. The Department notes that a Federal agency cannot conduct or sponsor a collection of information unless it is approved by OMB under the PRA, and displays a currently valid OMB control number, and the public is not required to respond to a collection of information unless it displays a currently valid OMB control number. See 44 U.S.C. 3507. Also, notwithstanding any other provisions of law, no person shall be subject to penalty for failing to comply with a collection of information onTj-0.00