


Statement Date: June 23, 2024

 yourEnergyBenefits.com

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 3. Scan the QR code with your phone



DC Online Account Statement Siemens Energy Savings Plan



Siemens Energy Savings Plan	
Account Summary	01-01-2024 to 06-21-2024
Opening Balance	\$570,176.48
Deposits	\$33,673.53
Withdrawals	\$0.00
Fees/Expenses	-\$39.18
Gains/Losses	\$7,711.77
Closing Balance	\$611,522.60
Vested Balance	\$611,522.60
Your Personal Rate of Return	1.30%

Scan here to learn how a professional can manage your account.



Contributions and Earnings



 You	\$309,344.03	51%
 Employer	\$296,674.60	49%
Total	\$611,522.60	100%

Your Contribution Rates

As of 06-21-2024

You may change your contribution rate at any time.

	Rate
Before-Tax Contribution Rate	10%
Roth 401(k) Contribution Rate	0%
After-Tax Contribution Rate	0%

Your Balances

As of 06-21-2024

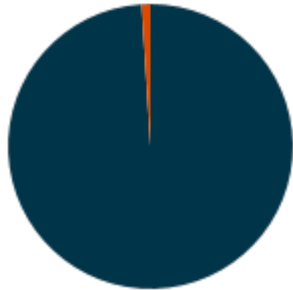
	Contributions & Earnings	Percent of Balance
Before-Tax Accounts	\$208,399.03	34%
After-Tax Accounts	\$24,059.24	4%
Employer Accounts	\$135,651.27	22%
Taxable Accounts	\$161,023.33	26%
Roth Account ¹	\$76,885.76	13%
QACA Match	\$5,503.97	1%
Total	\$611,522.60	100%

<p>Your Nontaxable Roth Balance: \$73,746.76</p>
<p>Your Other Nontaxable Balance: \$20,391.22</p>

¹You began making Roth contributions to the plan on January 15, 2021.

Your Investment Summary

Asset Allocation as of June 21, 2024



Stable Value	99%
Large Cap U.S. Equity	1%
Small/Mid Cap U.S. Equity ¹	<1%

¹Asset classes with less than 1% of your balance don't appear in the pie chart.

Keep a Long Term View

A diversified account will weather the market's ups and downs. Develop an investment strategy based on reason instead of emotion—and stick with it.

Fund Allocation as of 06-21-2024

Fund Name	Current Allocation	Future Investments Election
Stable Value	99%	0%
U.S. Large Cap Stock	1%	50%
U.S. Small-Mid Cap Stock	<1%	50%

Activity Detail by Fund

01-01-2024 to 06-21-2024		Asset Class		
		Stable Value	Large Cap U.S. Equity	Small/Mid Cap U.S. Equity
Fund Name	All Funds Total	Stable Value	US Lrge Cap Stk	Sml-Mid Cap Stk
Opening Balance	\$570,176.48	\$570,176.48	\$0.00	\$0.00
Contributions	\$33,673.53	\$30,020.40	\$1,826.58	\$1,826.55
Gains/Losses	\$7,711.77	\$7,691.82	\$51.18	-\$31.23
Expenses	-\$39.18	-\$39.17	-\$0.01	\$0.00
Closing Balance	\$611,522.60	\$607,849.53	\$1,877.75	\$1,795.32
Closing Units		19,411.438	24.584	30.519
Unit Price (NAV)		31.313988	76.381889	58.825836

Your Fee and Expense Details

01-01-2024 to 06-21-2024

	Amount
Administration Fee	\$39.18

Your Beneficiaries

As of 06-21-2024

You may change your Siemens Energy Savings Plan beneficiaries at any time using yourEnergyBenefits.com at yourEnergyBenefits.com.

Primary Beneficiary	Benefit Percentage	Relationship
Diane M. Paquette	100%	Spouse

Contingent Beneficiary	Benefit Percentage	Relationship
Diane Marie Paquette or her successor as Trustee of the Donald and Diane Paquette Trust dated November 13 2015	100%	Trust

Review Your Statement

If you notice any errors in your account statement, please contact the Siemens Energy Savings Plan promptly at the phone number below.

Protect Your Data

Maintaining the security of your account is important. In addition to the strict security measures and procedures we take to limit risk, below are commonsense steps you can follow to protect your account:

- **Keep all contact information (including mobile number) up to date** so that we may contact you quickly if we suspect suspicious activity.
- **Update security software on any device you use to access your account.** Use a private device and a protected wireless connection.
- **Choose a password that you'll only use for this account.** Don't save your logon information on a device.
- **Do not share your account access or logon information** with anyone, including friends and family.

■ **Contact us immediately if:**

- Your account logon information was compromised or your account-related information was affected by identity theft (for example, if someone's using your credentials to impersonate you).
- You receive any communications about suspicious account activity.

For More Information

Online

yourEnergyBenefits.com

Phone

between 10 a.m. and 6 p.m., Eastern time, Monday through Friday

Toll-free at 1-844-950-0359

Generally, you'll have a shorter wait time if you call after Tuesday.
