This Consulting Services Agreement ("***Agreement***") is effective 1/1/2027 ("***Effective Date***") between Alliant Insurance Services, Inc., a California corporation with its principal place of business at 18100 Von Karman Ave., 10th Floor, Irvine, CA 92612 ("***Alliant***"), and Town of Apex, NC, a North Carolina municipality, with its principal place of business at 73 Hunter Street Apex, NC 27502 ("***Client***"). Alliant and Client may be referred to in this Agreement individually as a "***Party***" and together as the "***Parties***." The schedules, attachments and exhibits referenced in and attached to this Agreement shall be deemed an integral part of this Agreement and the term Agreement as referenced herein shall include all schedules, attachments and exhibits. In the event any inconsistency or conflict exists between the provisions of this Agreement and any schedules, attachments or exhibits attached hereto, the provisions of this Agreement shall supersede the provisions of any such schedules, attachments or exhibits.

1. **Services**.

   a. **Scope of Services**. Alliant shall provide the services described in Schedule I (collectively, "***Services***") for Client's employee benefit plan(s) for which Alliant is designated as the broker of record ("***Plan(s)***").

   b. **Services Warranty.** Alliant warrants that the Services will be performed in a professional manner by appropriately qualified personnel in accordance with applicable laws and generally accepted industry practices. This warranty is contingent upon Client's timely provision of complete and accurate information as required under Section 3. Alliant disclaims all other warranties, express or implied, including warranties of title, merchantability or fitness for a particular purpose.

2. **Compensation Disclosure**. In consideration for the Services, Alliant shall receive, and discloses to the Client, the compensation it receives pursuant to this Agreement in Schedule II.

3. **Client Obligations**.

   a. **Service-Specific Obligations**. Client shall be responsible for all client obligations identified in Schedule I.

   b. **Client-Provided Information.** Client shall, promptly after the Effective Date and thereafter upon Alliant's request, provide all information requested by Alliant that may be necessary for Alliant to perform the Services, including, without limitation, information about Client, Client's existing employee benefits plans, loss experience, and risk exposures; provided that, Client shall not provide Alliant with any individual's personally identifiable information unless Alliant specifically requests such information to perform the Services. Client acknowledges that Alliant relies on such Client-provided information to perform the Services. Client confirms that all information it provides to Alliant will be complete and accurate.

c. **Material Changes.** Client shall promptly report to Alliant in writing any significant changes in exposures, loss-related data, Client's operations, coverages or limits, lines of coverage, or any other change that will change the scope or nature of Client's insurance plans.

d. **Review.** Client shall promptly review coverage documents, templates, and other documents for the Plan(s) provided by Alliant, the insurer, or the third-party administrator ("***TPA***"), to ensure that the documents are consistent with Client's specifications. Client shall promptly inform Alliant of any

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

discrepancies or required changes.

e. **Delay.** Client shall perform its obligations under this Section 3, including the obligation to provide all information requested by Alliant, as soon as practicable but no later than the dates agreed upon by Alliant and Client. Alliant is not liable for any delay or partial performance in performing the Services to the extent such delay or partial performance arises from Client's delay in performing its obligations under this Section 3 or promptly making decisions related to the Plan(s).

4. Disclaimers.

a. **Not Legal or Tax Advice.** Alliant is not responsible for Client's compliance with any laws, regulations, and/or statutes affecting the Plan(s). None of the services, advice, recommendations, or communications provided by Alliant constitutes legal or tax advice, analysis, or opinion, and Client shall not interpret or rely on any of Alliant's Services, advice, recommendations, or communications as legal or tax advice, analysis, or opinion.

b. **No Fiduciary Relationship.** Alliant will not have discretionary authority or discretionary control with respect to the administration or management of any of the Plan(s). Alliant also will not have authority to exercise any discretion or control with regard to the management, use, or disposition of any assets of the Plan(s) and will not render any investment advice with respect to the Plan(s) or any assets of the Plan(s). Alliant does not provide services as a fiduciary of the Plan(s), and its performance of the Services will not make it a "fiduciary" for purposes of the Employee Retirement Income Security Act of 1974 ("***ERISA***"), as amended. Client shall not represent that Alliant is a fiduciary for purposes of ERISA.

c. **Plan Recommendations and Funding**. Any plans or plan provisions recommended by Alliant are solely recommendations, and Client, not Alliant, has the ultimate authority to select and modify the plans. Alliant shall have no responsibility, risk, liability, or obligation for funding the Plan(s). All responsibility, risk, liability, and obligation for funding the Plan(s) lies solely with the Plan(s) and the plan sponsor(s).

d. **Other Brokers.** Alliant is not responsible for, and hereby disclaims all liability for, any acts, errors, and/or omissions of Client's previous or current brokers, consultants, and/or advisors. If Client has any employee benefits plan(s) for which Alliant is not the broker of record, Alliant is not responsible for performing any services with respect to such plan(s) and hereby disclaims all liability for any acts, errors, and/or omissions of Client's other brokers, consultants, and/or advisors.

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

5. Confidentiality.

a. **Definitions.** The Services and work product exchanged by the Parties under this Agreement are to be used exclusively to carry out the terms, conditions, and purposes set forth in this Agreement. During the Term, the Parties may each exchange information considered confidential, proprietary, and/or trade secret, including, without limitation, financial information, pricing information, intellectual property, ideas, concepts, systems, designs, research and technical information, business and operational policies, plans, processes, procedures and strategies, system design and operating specifications, data, recommendations, proposals, reports and similar information (collectively, "***Confidential Information***"). For purposes of this Section 5, the Party disclosing Confidential Information is the "Disclosing Party" and the Party receiving Confidential Information is the "***Receiving Party***".

b. **Exclusions.** Confidential Information does not include information that is (i) in, or that becomes part of, the public domain other than as a result of a breach of this Section 5; (ii) independently developed by the Receiving Party as demonstrated by its records; (iii) lawfully known by the Receiving Party, without any obligation of confidentiality or other restriction on use or disclosure, prior to disclosure of the information by Disclosing Party; or (iv) disclosed by a third party whom the Receiving Party has no reason to believe has any confidentiality or fiduciary obligation to such information's owner.

c. **Legal Compulsion.** A Receiving Party may disclose Confidential Information only to the extent necessary to comply with a valid order of a court or governmental agency with proper jurisdiction or as required by law or regulation; provided that, the Receiving Party shall, to the extent allowed by law, promptly advise the Disclosing Party of the order, subpoena, or request in order to enable the Disclosing Party to employ lawful means to avoid or limit disclosure. Either Party is also entitled to release Confidential Information as required to prosecute or defend any claim under this Agreement; provided however, that the Party seeking to release or use the information shall take all reasonable steps necessary to avoid disclosing Confidential Information, including filing documents and papers under seal.

d. **Non-Disclosure; Reasonable Efforts**. Except as otherwise provided in this Agreement or as required by applicable law, a Receiving Party shall not distribute, use, or rely upon Confidential Information without the Disclosing Party's permission. Additionally, except as otherwise provided in this Agreement, a Receiving Party shall not directly or indirectly communicate, divulge, or otherwise disclose the Confidential Information to any unauthorized person or entity. The Parties shall employ reasonable and customary business practices to protect and secure Confidential Information from unauthorized release or distribution and to limit access and usage of Confidential Information to those employees, officers, directors, agents, subcontractors, representatives, and advisors (including, without limitation, attorneys, accountants, and financial advisors and, in the case of Client, its Council) (collectively, its "Representatives") who have legitimate "need to know" the information in order to perform under this Agreement and who are bound by obligations of confidentiality no less restrictive than this Section 5. The Receiving Party will be liable for any breach of this Agreement by any of its Representatives. Notwithstanding anything in this Section 5 to the contrary, Client agrees and acknowledges that Alliant may also disclose Client's Confidential Information to Client's insurers, underwriters, and other recognized intermediaries and administrators solely as needed to market and service Client's Plan(s), insurance programs, or portions thereof; provided, however, that Alliant shall first inform such recipients of the confidential nature of the information.

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

e. **Ownership of Confidential Information.** Except as otherwise provided in this Agreement, Confidential Information is and remains the absolute and exclusive property of the Disclosing Party and its unique and variable asset.

f. **Return or Destruction of Confidential Information**. Upon this Agreement's termination or earlier upon the Disclosing Party's written request, the Receiving Party shall promptly return or destroy all Confidential Information, including all copies, received in non-electronic form and shall destroy all information received electronically. Notwithstanding anything to the contrary in this Agreement, the Receiving Party may retain copies of Confidential Information in order to comply with legal or regulatory requirements and any electronic files automatically saved pursuant to its archiving and document retention procedures and that cannot reasonably be deleted; with respect to all such retained copies, the Receiving Party will remain subject to the confidentiality obligations stated in this Section 5 for so long as the copies are retained.

g. **Business Associate Agreement**. To the extent applicable, if the performance of this Agreement involves the use or disclosure of Protected Health Information ("PHI"), as that term is defined in 45 C.F.R. § 160.103, then the Parties acknowledge and agree to comply with the Business Associate Agreement, attached as an exhibit to this Agreement and hereby incorporated by reference.

h. **Survival.** The obligations contained in this Section 5 will survive termination of this Agreement for a period of two years or longer as required by law. Nothing in this section limits or otherwise diminishes the protections afforded to trade secret information or by applicable law.

6. Licenses and Ownership.

a. **Media License**. To the extent that Alliant will prepare benefit brochures, open enrollment materials, or other benefit communications for Client's employees (collectively, "***Benefit Materials***"), and Client has or will provide photographs, images, other media, trademarks, and/or logos (collectively, "***Media***") to include in the Benefit Materials, Client hereby grants Alliant a worldwide, perpetual, royalty-free, non-exclusive, sublicensable right and license to use the Media solely in the Benefit Materials. This license includes the right to use, reproduce, edit, crop, retouch, distribute, and create derivative works of the Media as needed to incorporate the Media into the Benefit Materials and to otherwise prepare and distribute the Benefit Materials. Client represents and warrants that (i) it is the owner of the Media or has the right to grant Alliant the licenses to use the Media, free of all liens, claims, and encumbrances; and
(ii) Alliant's use of the Media as specified in this Agreement will not infringe the rights, including the personal or proprietary rights, of any other party.

b. **Other Client Information**. Client hereby authorizes and grants Alliant the right to use all Client-provided information solely as necessary to provide the Services. Client represents and warrants that it has or will obtain the necessary consents from each individual before providing or otherwise disclosing any of the individual's personally identifiable information to Alliant.

c. **Ownership**. Except as otherwise expressly stated in this Agreement, Client will retain all ownership rights in the Media and other Client-provided information. Alliant will retain all ownership rights to all

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

information, data, benefit analysis, materials, specifications, and products supplied by Alliant (collectively, "***Work Product***"), together with all intellectual property rights in the Work Product. Work Product is solely for use by Client and its Plan(s) and may not, without Alliant's prior written consent, be shared with anyone other than Client's employees and advisors who have a legitimate need to know as a result of their services to the Plan, Plan participants and beneficiaries, or as required by law, but in no event may the Client share the Work Product with any third party for the purpose of creating derivative works or competitive products.

7. Term and Termination.

a. **Term**. Unless terminated in accordance with this Section 7, this Agreement will have an initial term of five (5) years from the Effective Date ("***Initial Term***"), after which it may be renewed in a writing signed by both parties for successive one-year periods ("***Renewal Term(s)***"). The Initial Term and all Renewal Term(s) are collectively the "***Term***."

b. Termination.

i. **For Convenience**. Either Party may terminate this Agreement by notifying the other Party in writing of its intent not to renew the Agreement at least sixty (60) days before the end of the Initial Term or the then-current Renewal Term. Additionally, during any Renewal Term, either Party may terminate this Agreement for any reason upon ninety (90) days' prior written notice.

ii. **For Cause**. During the Initial Term or any Renewal Term, either Party may terminate this Agreement if the other Party's material breach remains uncured for thirty (30) days following its receipt of the terminating Party's written notice of the breach.

iii. **Immediate Termination**. Either Party may terminate this Agreement immediately upon written notice if the other Party becomes insolvent, makes an assignment for the benefit of creditors, or files for bankruptcy.

c. Final Fees. No later than thirty (30) days after this Agreement's termination, Alliant shall issue a final invoice for any services performed and expenses incurred by Alliant on or before the Agreement's effective date of termination and that remain payable by Client. The Client shall pay such invoice within forty-five (45) days of its receipt of the invoice.

d. Survival. Except as otherwise stated in this Agreement, the rights and obligations contained in Sections 5, 6, 7, 8, 9, and 10 of this Agreement shall survive the termination of this Agreement.

8. Indemnification.

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

9. **LIMITATION OF LIABILITY. NEITHER PARTY WILL BE LIABLE TO THE OTHER PARTY FOR ANY SPECIAL, INDIRECT, CONSEQUENTIAL, OR PUNITIVE DAMAGES ARISING OUT OF THIS AGREEMENT, EVEN IF THAT PARTY KNOWS OF THE POSSIBILITY OF SUCH DAMAGES. ADDITIONALLY, NEITHER PARTY WILL BE LIABLE TO THE OTHER PARTY FOR DAMAGES OF ANY KIND IN AN AMOUNT IN EXCESS OF THE TOTAL AMOUNT PAID OR PAYABLE TO ALLIANT FOR THE SERVICES IN THE TWELVE-MONTH PERIOD PRECEDING THE INCIDENT GIVING RISE TO SUCH LIABILITY. NOTWITHSTANDING THE FOREGOING, NOTHING SHALL LIMIT A PARTY'S LIABILITY RESULTING FROM THE PARTY'S FRAUD, GROSS NEGLIGENCE OR WILLFUL MISCONDUCT.**

10. **Miscellaneous**.

a. Independent Contractor. Alliant is an independent contractor for Client. This Agreement does not create a partnership, joint venture, franchise, employment, or any agency relationship between the Parties. Neither Party has any authority to act on behalf of the other Party or bind the other Party in any respect; provided, however, that Alliant has the authority to act as a broker on behalf of Client as contemplated hereunder.

b. Notice. All notices given under this Agreement shall be in writing and deemed given: (i) on the business day when delivered personally; (ii) one business day after being sent by a reputable overnight courier services (charges prepaid); or (iii) five business days after being sent by certified mail (charges prepaid). Notices must be sent to the Party's following address or any other address that the Party designates by proper notice:

If to Client:	**If to Alliant:**
Town of Apex 73 Hunter Street Apex, NC 27502 Attn: Courtney Jones	Alliant Insurance Services, Inc. 227 W. Trade St Suite 1930 Charlotte, NC 28202 Attn: Kevin Wintermute ***With a copy to:*** **Before January 1, 2027:** Alliant Insurance Services, Inc. 701 B Street, 6th Floor San Diego, CA 92101 Attn: Chief Legal Officer In addition, send a courtesy copy of any notice electronically to CorpLegalOps@alliant.com. Electronically received notices do not constitute formal delivery under this section.

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

c. **Governing Law; Waiver of Jury Trial; Venue**. This Agreement will be governed by and construed in accordance with the laws of **North Carolina** without regard to its conflicts of law principles, and the Parties each consent to the exclusive jurisdiction of the state and federal courts in **North Carolina**.

d. **Assignment**. Neither Party may assign this Agreement without the prior written consent of the other Party, except that prior written consent will not be required for a Party to assign this Agreement to its successor in interest in connection with a merger, consolidation, reorganization, or sale of substantially all that Party's assets. Subject to the foregoing, this Agreement shall inure to the benefit of and be binding upon the Parties and their permitted successors and assigns.

e. **Waiver**. A Party's failure to enforce any provision of this Agreement shall not be construed as a waiver of that provision and shall not prevent the subsequent enforcement of each and every provision of this Agreement.

f. **No Third-Party Beneficiaries**. Except as stated in this Agreement, this Agreement does not create any right or cause of action in or on behalf of any person or entity other than the Parties.

g. **Counterparty; Electronic Signature**. This Agreement may be executed in several counterparts, each of which so executed will be deemed to be an original, and such counterparts together will constitute one and the same instrument. The Parties acknowledge and agree that this Agreement may be executed by electronic signature, which will be considered as an original signature for all purposes and shall have the same force and effect as an original signature.

h. **Entire Agreement; Amendments; Severability**. This Agreement, together with its attached Initial SOW and exhibits, constitutes the entire agreement between the Parties relating to its subject matter and supersedes all prior or contemporaneous agreements, negotiations, representations and proposals of any kind, whether written, oral, express or implied, related to its subject matter. Any modification to this Agreement must be in writing and signed by authorized representatives of both Parties. If any provision of this Agreement is declared invalid by a court of competent jurisdiction, that provision will be severed from this Agreement without affecting the validity or enforceability of all other provisions of this Agreement, which will remain in full force and effect.

i. **Construction**. The Parties jointly negotiated the terms of this Agreement, and each Party had an opportunity to review and discuss each provision with legal counsel, to the extent desired. Therefore, the normal rule of construction that construes any ambiguities against the drafting party shall not be employed in the interpretation of this Agreement.

j. **Authority**. Each person signing this Agreement warrants that he or she is authorized to enter into this Agreement on behalf of the Party he or she represents.

k. **E-Verify**. Alliant shall comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes (E-Verify). Alliant shall require all of Alliant's subcontractors to comply with the requirements of Article 2 of Chapter 64 of the North Carolina General Statutes (E-Verify).

l. **Anti-Human Trafficking**. Alliant warrants and agrees that no labor supplied by Alliant or Alliant's subcontractors in the performance of this Agreement shall be obtained by means of deception, coercion, intimidation or force, or otherwise in violation of North Carolina law, specifically Article 10A, Subchapter 3 of Chapter 14 of the North Carolina General Statutes, Human Trafficking.

m. **Nondiscrimination**. Pursuant to Section 3-2 of the Town of Apex Code of Ordinances, Alliant hereby warrants and agrees that Alliant will not discriminate against a protected class in employment, subcontracting practices, or the

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

solicitation or hiring of vendors, suppliers, or commercial customers in connection with this Agreement. For the purposes of this Agreement "protected class" includes age, race, religious belief or non-belief, ethnicity, color, national origin, creed, sex, sexual orientation, gender identity, marital status, natural hair style, genetic information, pregnancy, familial status, disability, veteran or military status, or disabled veteran status.

n. **Nonappropriation.** Notwithstanding any other provisions of this Agreement, the parties agree that payments due hereunder from the Client are from appropriations and monies from the Town of Apex Town Council and any other governmental entities. In the event sufficient appropriations or monies are not made available to the Client to pay the terms of this Agreement for any fiscal year, this Agreement shall terminate immediately without further obligation of the Client.

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

SO AGREED:

Town of Apex

By: _____
Name:
Title:

Alliant Insurance Services, Inc.

By: _____
Name:
Title:

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

SCHEDULE I
Services

1. **Plans and Lines of Coverage**. The services set forth in Schedule I.a. apply to the following Client's current group benefits programs. Core benefits included:

- Medical benefit plans
- Pharmacy benefit plans
- Stop loss insurance
- Dental benefit plans
- Vision benefit plans
- Employee Assistance Programs
- Life and Accident insurance plans
- Disability insurance plans
- Administrative plans (does not include provision of actual TPA services)
- Flexible Spending Accounts
- Wellness plans
- Voluntary benefits plans

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

A. Standard Services

Service	Frequency
Overall Strategy	
Set/review goals and objectives against financial strategies	Annually
• Evaluate market trends, competitive environment, and culture	Annually
• Develop/refresh multiyear strategic glide path and financial plan to support goals and objectives	Annually
• Benchmark plan designs, costs and contributions	Annually
• Facilitate planning meetings and prepare executive-level documents as necessary	Annually
• Evaluate funding and risk retention strategies	As Needed
• Develop and manage service/benefit calendar	Annually
Additional Overall Strategy Services:	
Develop custom benchmarking	Annually
Financial and Renewal Management	
Deliver expected vs. budget reports including claim experience, fixed fees, and high-cost claims	Monthly
• Prepare pre-renewal analysis to inform renewal strategy	Annually
• Initiate renewals with vendors, negotiate annual rates and terms and conditions	Annually
• Conduct self-insured underwriting analysis	Annually
• Price plan design alternatives	Annually
• Develop employer premiums and calculate COBRA rates	Annually
• Model employee contributions	Annually
• Develop budget projections	Annually
• Calculate annual reserve (IBNR) estimates	Annually
Additional Financial and Renewal Management Services:	
Determine Medicare creditable coverage eligibility and provide attestation letter	Annually
Marketing and Placement Support	
Prepare request for proposals ("***RFP***") - evaluate potential vendors and develop bid specifications	As needed
• Conduct detailed bid analysis – compare financial and quality responses, review plan designs, evaluate alternative cost and funding alternatives, negotiate performance guarantees	As needed
• Facilitate finalist meetings and scorecard analysis; negotiate best and final rates	As needed
• Implementation support: facilitate project plan management, review administrative agreements and contract terms and conditions	As needed
Additional Marketing and Placement Services:	
Conduct network discount and disruption analysis	As needed
Vendor Management	
Manage and regularly evaluate insurance carrier and service provider relationships	Ongoing
• Conduct utilization review meetings	Quarterly
• Support escalated claim or plan design issues	As needed

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

Service	Frequency
• Review plan document changes (contracts, policies, SBCs)	Annually
Benefit Administration	
Implementation of benefit administration technology platform	Ongoing
Support for platform use for new hires and open enrollment	Ongoing
Carrier data file integration for eligibility management	Ongoing
Payroll import ready deduction files	Ongoing
Health, Well-Being Productivity	
Develop well-being strategy (including incentive design) in combination with annual benefit objective setting and strategy discussions	Annually
• Assist in navigating the vendor landscape as it pertains to well-being programs and point solutions	Ongoing
• Support marketing of vendors	As needed
• Provide access to standard communication toolkit including monthly newsletter, annual communications calendar, health educational flyers and pamphlets on relevant health conditions and well-being initiatives	As needed
• Share clinical opinion guides and infographics on common topics such as preventive care, cancer, diabetes, stress, screenings and biometrics	As needed
• Support annual review of program engagement, participation and outcomes reports and provide feedback and recommendations	As needed
• Provide templates for employee and employer surveys and assessments	As needed
Compliance	
Offer ongoing education through webcasts, podcasts, white papers, and legislative alerts	Ongoing
Provide daily Q&A support by designated Alliant compliance consultant on client's group health plan compliance questions, e.g. COBRA, HIPAA, ACA, section 125, etc.	Ongoing
Provide consolidated annual notices package that includes the main Federal requirements including Medicare Part D, HIPAA privacy, Women's Healthcare Rights Act	Annually
Provide template documents for compliance SPD's, Summary Material Modifications, COBRA model notices, customizable HIPAA Privacy and Security policies and procedures	As needed
Access to Human Resources Support Service, e.g., HR Workplace	Ongoing
Communications	
Facilitate communication strategies for open enrollment and new hires	Annually
Assess current communication materials provided by vendors and developed in-house	Annually
Draft open enrollment materials based on Alliant's template materials including announcement letter/email, open enrollment PowerPoint, benefit guides	Annually
Provide consolidated annual notices package that includes the main Federal requirements including Medicare Part D, HIPAA privacy, Women's Healthcare Rights Act	Annually
Coordinate vendor materials and supplies to support open enrollment	Annually
Provide access to library of videos and educational materials	As needed
Conduct open enrollment meetings and/or virtual or live benefits fairs	As needed

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

Service	Frequency
Provide Benefit Advocate services including call center assistance for plan members	Ongoing
Alliant Medicare Solutions including provision of educational materials and decision support for employees eligible for Medicare via employer-specific toll-free number	

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

B. Analytics Services

Service	Frequency
Financial Services	
Underwriting service and support on self-funded medical plan, including models and assumption recommendations	As needed
Underwriting service and support on fully-insured medical, dental, and vision plans, including models and assumption recommendations	As needed based on data availability
IBNR development	As needed
Migration analysis, including advice on potential enrollment changes based on plan structure	As needed
Contribution analysis, including advising on potential employee contribution structure to achieve strategic goals	As needed
Plan design change analysis	As needed
Creditable coverage analysis—Medicare or state specific	Once annually
Provide financial impact of new regulation	As needed
Carrier change discount database comparison (major carrier networks only)	Once annually
Track and monitor stop loss claim reimbursements through plan year	As needed
Trend analysis	Once annually
IBNR review, including review of locally developed IBNR analysis and actuarial attestation	Once annually
Captive medical claim pricing, including determination of potential liability of placing stop loss in a captive arrangement	As needed
Fully-insured v. self-insured analysis	As needed

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

C. Alliant Analytics Data Warehouse

Alliant's Data Warehouse is comprised of three core tools: our web-based platforms – Executive Analytics ("***EA***") and Alliant Analytics ("***AA***"), and our internally derived Alliant Interactive Analytics ("***AIA***"). Our data warehouse is developed to allow plan insights analysis aggregated from member-level data including eligibility, medical, and pharmacy data. Additional data may be integrated as well, including but not limited to dental claims, vision claims, biometric data, and third-party point solutions.

Alliant's Data Warehouse collects and leverages Client's raw healthcare data for the purpose of:

- Analyzing historical claim and enrollment trends
- Identifying clinical cost drivers and utilization trends
- Providing high-cost claimant reviews and large claim predictive analytics
- Evaluating the impact of potential future cost avoidance strategies
- Stratifying the severity and prevalence of chronic conditions in the client's population
- Monitoring population health quality metric completion rates
- Exploring the utilization of providers based on provider quality metrics
- Other analytics and strategic reviews based on Client's evolving plan needs

Additional interpretation and engagement may be provided via Alliant's Health & Productivity, Pharmacy, Clinical, Financial Consulting, Stop Loss and other internal experts as needed in support of the dedicated Client team.

Deliverables

Standard:

- Dashboards (cadence will be determined)
    - Executive Dashboard
    - Clinical Dashboards
    - Alliant Analytics Standard Reports
    - Alliant Interactive Analytics Dashboard packages

Ad-Hoc reports, dashboard Analysis to support client and account team inquiries.

Exclusions and Additional Fees.

Standard Fees exclude external fees that may be imposed by the Client's insurance carriers or other third-party data providers for the setup and maintenance of the Alliant Data Warehouse data feed.

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

SCHEDULE II
COMPENSATION DISCLOSURE

As consideration for the Services Alliant provides pursuant to this Agreement, Alliant will receive the compensation set forth below. To the extent applicable, this compensation information is disclosed pursuant to ERISA section 408(b)(2) or other applicable law, and in order for Client to comply with any fiduciary duty to determine the reasonableness of the compensation Alliant will receive under the Agreement.

Alliant may be paid both direct and indirect compensation for the Services provided. Indirect compensation may include both base and contingent commissions from certain insurance carriers. Contingent commissions are generally calculated at the calendar year end and contingent upon a number of factors not directly related to Client's plan. Whether Alliant receives contingent commissions is a decision made exclusively by each carrier based on their own unique set of factors. These factors include the overall number of employer plans and/or plan participants in plans for which Alliant placed insurance, and retention rates, among others. In general, payment of contingent commissions does not impact your plans' premiums. Historically, these contingent commissions are in the ranges noted in the table below. Alliant uses this contingent and supplemental compensation to staff and resource proprietary programs specifically designed to maximize the performance of your plan and provide the highest quality experience for your employees and their dependents.

1. **Direct Compensation.**

   a. **Fees.** Client shall pay Alliant the following fees for the Services set forth above.

   The fee for the standard Services will be $125,000 per year.

Policy Year	Fee
2027	$125,000
2028	$125,000
2029	$125,000
2030	$125,000
2031	$125,000

   b. **Payment.** Client shall pay any fee hereunder within forty-five (45) days of its receipt of Alliant's invoice.

   c. **Contingent Commission Opt Out.** As set forth above, Alliant may receive income as a result of contingent commission agreements with certain insurance carriers. Client may opt-out of having its plan premiums included in the calculation of these contingent commissions by accessing the "opt-out" form from the link on Alliant's website: http://www.alliant.com/Legal-Notices/Pages/Disclosure-Policy.aspx. The parties acknowledge that these commissions, if any, are determined by insurance carriers, and if the Client does not opt-out, it remains the carriers' exclusive decision to include or exclude certain premiums in any calculation. The availability of information

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com

related to the carriers' decision-making process on the payment of these contingent commissions is solely within the discretion of each insurance carrier. Note that if your organization has opted out of contingent or override commissions, Alliant returns those commissions to the carrier per the opt-out request, if received.

d. **Noncash Compensation.** Alliant may, as is standard in the industry, receive certain non-cash compensation from Plan insurance carriers, vendors, and service providers that is not connected to any particular employer plan or Alliant client. Provision of non-cash compensation is solely within the discretion of the entity providing Alliant the non-cash compensation. This compensation can include gifts valued at less than $100 annually, an occasional dinner, or ticket to a sporting event, or other entertainment, or reimbursements in connection with educational meetings or training events, client workshops or events, or marketing or advertising initiatives. Plan vendors, insurance carriers, and service providers may also occasionally pay or reimburse Alliant for the costs associated with, education or training events that certain Alliant team members attend, and for Alliant sponsored conferences and events.

e. **Changes in Services.** If Client requests a change in Services or if changes in Client's size, operations, or organization require a change in the scope and/or nature of the Services and/or Plans, the compensation described in this Section 1 will be adjusted accordingly.

CA License No. 0C36861 | © 2026 Alliant Insurance Services, Inc. | alliant.com