

For employees terminating on or after Dec. 1, 2023





Existing within this material are brief, general descriptions of the plans available. If any part of this information should conflict with the plan's legal documents, the legal documents will control. Participation in these plans is not a guarantee that benefit levels or employer contribution will remain unchanged in the future. The company reserves the right to change or terminate these plans at any time for any reason. If material changes are made, participants will be informed about them as required by law.



For employees terminating on or after Dec. 1, 2023

Benefit	When Coverage	Continuation Options Available
Plans	Ends	
Medical, Dental and Vision Care	Active plan participation ends the last day of the month in which your employment ends. Note: You will receive COBRA information from the RASC for medical, dental and vision.	of the month following your termination date. The maximum COBRA eligibility period is 18 months. You may elect or decline medical, dental and vision COBRA coverage. If you elect coverage, you pay your medical, dental or vision coverage at the COBRA rate (102% of the total premium, shown in the Appendix) during your COBRA period. COBRA is administered by the Rockwell Alight Service Center (RASC). The Working Spouse/Domestic Partner Adjustment is not continued if you elect COBRA. Health Management incentive credit ends at the end of the month in which you terminate your active employment. All premiums will be billed monthly by the RASC at the full COBRA rate and may be paid by credit card, direct debit, or check. The RASC will mail out to you your COBRA rights notification. Please read this document carefully. Alternatively, if you meet the following criteria at termination: You are at least age 55 but not yet 65, and
		 You have at least 10 years of service, and Your age plus years of service total 75 or more, you may be eligible to enroll for coverage in the Retiree Medical Plan on the first of the month following your termination date.
		Note: Certain employees are not eligible to participate in the Rockwell Automation Retiree Medical Plan. The options available and cost may be different than the ones you had while you were working. Coverage after

What You Need To Do

Be sure to notify the RASC of any change of address to ensure that you receive correspondence related to your benefits.

For more information contact the RASC at 877.OUR.RASC (877.687.7272) between 8 a.m. and 4 p.m. Central Time, Monday through Friday.

Retiree Medical Plan

To enroll, confirm your eligibility for the Retiree Medical Plan, or obtain option and rate information, contact the RASC at 877.687.7272.

If you qualify for company contributions toward retiree medical premiums, you must apply for retiree medical coverage when you terminate so there is no gap in coverage.

For information about Dental and Vision benefits please refer to the Retirement Guide.

If you are Medicare eligible, contact Via Benefits at 844-596-0462, Monday through Friday, 7 a.m. to 8 p.m. Central Standard Time.

Refer to the Retirement Guide for information about retiree medical coverage and options (download a copy from raquickfind.com).

You are not required to commence your pension benefits when you begin retiree medical coverage.

through Via Benefits.

age 65 is available in the individual Medicare market



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Benefit Plans	When Coverage Ends	Continuation Options Available	What You Need To Do
Legacy Health Reimbursement Account (HRA)	Active plan participation ends the last day of the month in which your employment ends.	Employees who had HRA account balances at the end of 2022 had those accounts moved to HealthEquity for use through Dec. 31, 2025, or the termination of their Rockwell Automation medical plan participation, if earlier. If you continue coverage in a Rockwell Automation health plan through COBRA or retiree medical (up to age 65, for you or eligible dependents, or through Dec. 31, 2025, if earlier) your participation to spend down your HRA balance in the HRA account also continues. When your participation in a Rockwell Automation Medical plan option ends you forfeit any unused HRA account balances.	Continue your participation in a Rockwell Automation medical plan option by paying the required COBRA contributions (or if eligible elect retiree medical). You may manage your HRA spend down reimbursements through Health Equity by accessing your account at https://my.healthequity.com or you can call Health Equity at 866.346.5800. Service Representatives are available to assist 24/7/365.
Health Savings Account (HSA) for HSA Option Participants	Account is portable.	If you continue coverage in the Health Savings Account option (HSA) through COBRA, you may be eligible to continue making HSA contributions on an after-tax basis. The money you have set aside in the HSA can be used to pay unreimbursed medical expenses under any future medical plan, including the HSA option for retired employees. COBRA premiums are payable from the HSA account. You may work with Health Equity to	Once COBRA ends, you must continue the HSA to maintain its favored tax status. If you keep the account with HealthEquity, a monthly service fee and other applicable fees will be automatically deducted from your account. You will receive information from HealthEquity after your termination. You can also request that HealthEquity send a check for the remaining account balance directly to another HSA administrator. For complete details, contact HealthEquity 24/7/365 at 866.346.5800.
Employee Assistance Plan (EAP)	Active plan participation continues for 36 months (about 3 years) after the last day of the month in which your employment ends.	Coverage will continue for 36 months (about 3 years) after the end of the month in which your employment ends.	No action required. Visit raquickfind.com for program and contact information.



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Benefit Plans	When Coverage Ends	Continuation Options Available	What You Need To Do
Health Care Spending Account (FSA)	Active plan participation ends the last day of the month in which your employment terminates. Expenses incurred through the end of the month in which you terminated are eligible for reimbursement.	Expenses incurred after the month in which you terminated may be covered if you elect COBRA continuation. You may continue coverage through COBRA for the calendar year in which you end employment by paying the same deduction on an after-tax basis. A COBRA notice will be sent to you within three weeks following your termination.	To continue coverage under COBRA, you must call the RASC to enroll within 60 days (about 2 months) of your last day worked. Claims must be submitted by March 31 of the following calendar year. Contact the RASC at 877.687.7272 or Smart-Choice Accounts through Your Benefits online tool digital.alight.com/rockwellautomation to obtain a claim form or submit a claim electronically.
Dependent Care Flexible Spending Account (FSA)	Active plan participation ends the last day of the month in which your employment ends.	None.	Claims for expenses incurred through the end of the month in which you stopped working must be submitted by March 31 of the following calendar year. Contact the RASC at 877.687.7272 or Smart-Choice Accounts through Your Benefits online tool digital.alight.com/rockwellautomation to obtain a claim form or submit a claim electronically.
Short-Term Disability (STD)	Active plan participation ends the last day worked.	None.	No action required.
Long-Term Disability (LTD)	Active plan participation ends the last day worked.	None.	No action required.
Business Travel Accident Insurance	Active plan participation ends the last day worked.	None.	No action required.



Benefit Plans	When Coverage Ends	Continuation Options Available	What You Need To Do
Basic Life Insurance	Active plan participation ends the last day of the month in which your employment ends.	You may convert Basic Life Insurance coverage to a non-group, individual policy by applying directly to MetLife within 31 days of your coverage termination. Conversion means that you can elect coverage without proving that you are in good health. You will receive information about conversion in the mail from the RASC within two weeks of your termination date.	Decide if you want to convert your current coverage. Contact MetLife at http://mybenefits.metlife.com (You may reach this site via Your Benefits) or 800.638.6420 regarding conversion options and rates. Remember: You have only 31 days from the end of the month in which you last worked to convert coverage. Refer to group number 105796.
Supplemental Life for Employee, Spouse or Domestic Partner, and Child, and Voluntary Accidental Death and Dismemberment	Active plan participation ends the last day of the month in which your employment ends.	You may continue to have Supplemental Life and Voluntary Accidental Death and Dismemberment coverage in one of two ways. Portability means that you can continue coverage under the same or a similar group policy and be billed directly by MetLife. Alternatively, you may convert Supplemental Life insurance coverage to a non-group, individual policy. Conversion means that you can elect coverage without proving that you are in good health. You will receive information about conversion and portability in the mail from the RASC within two weeks of your termination date. Conversion or portability options must be exercised within 31 days from the end of the month in which you last worked.	Decide if you want to convert or continue your current coverage. Contact MetLife at mybenefits.metlife.com (you may reach this site via Your Benefits) or 800.638.6420 regarding conversion and/or portability options and rates. Remember: You have only 31 days from the end of the month in which you last worked to convert or port coverage. Refer to group number 105796.
Metropolitan Life Group Universal Life (GUL)	Coverage ends when you stop paying the required premium to the insurance carrier.	You may continue your policy by paying the premium directly to the insurance carrier.	Payroll deductions will stop as soon as Metropolitan Life receives your termination date from the RASC. Once payroll deductions stop, Metropolitan Life will send you billing information. If you have any questions, contact MetLife at mybenefits.metlife.com (you may reach this site via Your Benefits) or 800.438.6388. Refer to group number 96690.



Benefit Plans	When Coverage Ends	Continuation Options Available	What You N	lee d To Do
		_	No immediate action is receive distributed fidelity within a month for termination. This will expanded available to you regardinaccount. If your account balance is may choose to defer the a later date, but no later	equired. Ition information from ollowing your plain the options and your savings plan sover \$1,000, you distribution of funds to than your RMD Age: RMD Age: 70 1/2 72 73 75 Is less than \$1,000, you fact the Service Center OIK (877.765.4015) months) to choose to employer's plan, an rour account ou. If you do not about 3 months), your less applicable taxes
		You may continue to use Edelman Financial Engines services if you have a balance in the plan If you are retiring, refer to the Retirement Guide on raquickfind.com.	mailed to your home. If you do not receive info weeks after your termina at 877.765.4015. Service available from 8:30 a.m. Time.	ormation within six ation, contact Fidelity Representatives are



Benefit Plans	When Coverage Ends	Continuation Options Available	What You Need To Do
Rockwell Automation Non-Qualified Savings Plan (for employees earning more than the 401(a)(17) compensation limit)	Active plan participation ends when your employment terminates.	Your contributions end with your final regular paycheck. Distributions are paid automatically as a lump sum less applicable tax withholdings within 60 days (about 2 months) after the end of the month occurring six months following your termination or retirement date. Any change to your distribution options must be recorded on Fidelity's system one year prior to the date your distribution was originally scheduled to occur. Refer to the Plan Summary for information.	No immediate action is required. Contact Fidelity if you have questions or want to establish direct deposit at 877.ROK.401K (877.765.4015) or visit the NetBenefits Web site at www.401k.com. Review the Plan Summary (available from Fidelity) for more information. You will continue to receive an annual statement if you have a balance in the plan. Keep your address current by contacting Fidelity.
Rockwell Automation Deferred Compensation Plan (for certain management employees)	Active plan participation ends when your employment terminates.	Your compensation deferral will be deducted from any paycheck that has eligible compensation in the year you elected to defer. Based on federal rules, you must make your termination distribution election at least one year in advance. This means you will receive a lump-sum distribution unless you are retirement eligible and have made a distribution election at enrollment or at least 12 months prior to the date your distribution was originally scheduled to occur. All lump-sum and annual installment distributions for contributions made prior to Jan. 1, 2005, will be made within the first 60 days (about 2 months) of a calendar year. For example, a termination date in Dec. 2023 will result in a Feb. 2024 distribution of pre-2005 balances. For post Jan. 1, 2005, deferred compensation plan balances, you will receive distributions starting in July after the year in which you terminated. For example, with a termination date in Dec. 2023, balances from years 2005 or later will begin distribution in July 2024.	No immediate action is required. Contact Fidelity if you have questions or want to establish direct deposit. Call 877.ROK.401K (877.765.4015) or visit the NetBenefits Web site at www.401k.com. Review the Plan Summary (available from Fidelity) for more information. You will continue to receive an annual statement if you have a balance in the plan. Keep your address current by contacting Fidelity.



For employees terminating on or after Dec. 1, 2023

Benefit When Coverage **Continuation Options Available** Plans **Ends** Vesting and credited service You must have attained at least five years of vesting Rockwell will stop accruing when your service to be entitled to a pension benefit. **Automation** employment terminates (your **Pension Plan** For employees who are vested and terminate on or commence your benefit. last day worked) if it had not after January 1, 2014, an optional early distribution stopped earlier. For example, (including lump sum and annuity options) is available your credited service stopped for most participants. You may delay election of accruing on your benefit until earliest retirement: (i) the date that you commencement date if you attained age 55 with at least ten years of service; or (ii) elected to receive your the date that your age plus service is at least 75, with Qualified Pension Plan benefit at least ten years of service. Or you may defer election as an in-service distribution. until normal retirement date (age 65). If you are age Note: Certain employees do 65 or older when your employment ends, your benefit must start first of month following last day worked. not participate in the Rockwell Automation Pension Plan. Participants may elect monthly annuity or lump sum including those hired or benefit payment options. Before making an election, rehired on or after July 1, 2010 participants should carefully consider their benefit

commencement date, early reduction factors that

apply, and the payment option, as several factors may

affect payment options and benefit amounts.

Estimates of benefit amounts as of specific dates may be viewed on Your Benefits or obtained by contacting the RASC. Participants with complex calculations may not have access to online estimates and manually produced estimates can take 4-6 weeks.

If you have terminated employment and the present value of your vested accrued benefit is not greater than \$5,000, the Plan will distribute your benefit to you. If eligible, distribution and rollover election information will be mailed to you.

What You Need To Do

No immediate action is required, unless you are age 65 or older at the time of your termination, in which case you will need to

If you have a vested benefit in the pension plan, information regarding your benefits will be mailed to your home address within three months after your termination.

Contact the RASC to begin payments. It is recommended you apply 60 to 90 days (about 3 months) before your benefit commencement date (the date you want to receive payments). You must apply for benefits and return paperwork no later than the 10th of the month prior to the date you want benefits to begin.

To begin the process by phone, call the RASC at 877.OUR.RASC (877.687.7272) and say "pension" when prompted to be connected to a retirement specialist. You may use the Your Benefits online tool digital.alight.com/rockwellautomation Information is also available on raquickfind.com.

Refer to the Summary Plan Description for details about plan rules, deadlines, and provisions.

Keep your address current on Your Benefits or by calling the RASC



Benefit Plans	When Coverage Ends	Continuation Options Available	What You Need To Do
Rockwell Automation Non-Qualified Pension Plan (for certain management employees)	Vesting and credited service will stop accruing when your employment terminates (your last day worked) if it had not already stopped earlier. Your credited service stopped accruing on your commencement date if you elected to receive your Qualified Pension Plan benefit as an in-service distribution.	Distributions from the Non-Qualified Pension Plan cannot be made sooner than six months after your termination of employment. If the present value is not greater than the Internal Revenue Code 402(g) limit (for 2024 the amount is \$23,000) as of your termination date or the date you commenced your Qualified Pension Plan benefit as an in-service distribution, your benefit will be distributed in a lump sum. If your present value is greater than the 402(g) limit, you may receive monthly annuity payments or elect a lump sum payment (if election was made at least 12 months in advance). If you are eligible, your benefit will begin on the earliest of: (i) the date you attained age 55 with at least ten years of service; (ii) the date your age plus service is at least 75, with at least ten years of service; or (iii) the date you attain age 65.	No immediate action is required. If you have a benefit in the Non-Qualified Pension Plan, information regarding your benefits will be mailed to your home address about three months after your termination. Review the Plan Summary, available by calling the RASC, for more information. After you receive your Non-Qualified Pension Plan Commencement Kit, you may contact the RASC at 877.687.7272 to choose the form of payment. You must choose the form of payment and return paperwork no later than the 10th of the month prior to the date benefits begin. If you have questions about the plan, contact the RASC at 877.687.7272.



For employees terminating on or after Dec. 1, 2023

Benefit Plans	When Coverage Ends	Continuation Options Available	What You Need To Do
Stock Options (for certain management employees)	Long-term incentive (LTI) awards are granted only to active employees. Your grant date and your last day PAID are important dates for LTI awards.	Terminating your employment for any reason will affect your stock options. In all terminations, if your last day paid is less than one year from grant date, your option award is forfeited. If you are terminated for cause, all options are immediately forfeited. If you do not qualify as retired (see below) or terminated for cause, you will have three months after your last day paid, including severance pay, to exercise any VESTED options and UNVESTED options are forfeited on your last day paid. If you qualify as retired (see below) and you retire twelve or more months after the grant date, you have the lesser of five years or the remaining term of the options to exercise your options. Options continue to vest in retirement according to the vest schedule of your award (i.e., most commonly 1/3 per year). You are considered retired for stock option purposes if as of your last day paid (including severance if applicable), you are: (1) at least age 55 with at least 10 years of service, or (2) at least age 65 with at least 5 years of service. Any expiration or cancellation of stock option rights will be subject to all terms and conditions of the Stock Option Agreement. As always, you are responsible for monitoring the expiration date of your options. This summary is not intended to replace information previously provided to you in the applicable plan and/or option agreement.	Refer to the Stock Option Terms and Conditions provided to you at the time of grant. Your Schwab record will be updated automatically – no action is required on your part. For more information regarding your stock option account, contact Charles Schwab at 800.654.2593, Monday through Friday, 24 hours per day or visit http://eac.schwab.com and log on to your account. The Rockwell Automation contacts are: Courtney Chicantek (cchicantek@ra.rockwell.com) and Lisa Turkow (laturkow@ra.rockwell.com)



Benefit Plans	When Coverage Ends	Continuation Options Available	What You Need To Do
Restricted Stock Units and Performance Shares (other equity awards)	Long-term incentive (LTI) awards are granted only to active employees. Your grant date and your last day PAID are important dates for LTI awards.	Terminating your employment will affect your other LTI awards. In all terminations, if your last day paid is less than one year from grant date, your award is forfeited. If you are terminated for cause or do NOT qualify as retired (see below), your unvested LTI awards are forfeited. You qualify as retired for other equity awards if, as of your last day paid: (1) you are at least age 55 with at least 10 years of service, or (2) you are at least age 65 with at least 5 years of service. If you retire twelve or more months after the grant date, your performance shares are prorated based on days paid in the vesting cycle and vest to you at the end of the three-year performance cycle based on the performance for that grant. If you retire twelve or more months after the grant date, restricted stock units generally continue to vest according to the vest schedule of your award (i.e., most commonly 1/3 per year). Certain retention restricted stock unit awards do not allow for retirement treatment (continued vest) and unvested restricted stock units are forfeited. Refer to your award agreements in your Charles Schwab account.	Refer to the grant agreements provided to you at the time of grant. Your Schwab record will be updated automatically – no action is required on your part. For more information, the Rockwell Automation contacts are: Courtney Chicantek (cchicantek@ra.rockwell.com) and Lisa Turkow (laturkow@ra.rockwell.com).



For employees terminating on or after Dec. 1, 2023

Voluntary Programs

Benefit Plans	When Coverage Ends	Continuation Options Available	What You Need To Do
John Hancock Long-Term Care Insurance	Coverage is portable.	You may continue long-term care coverage by paying premiums directly to the insurance carrier. Payroll deductions will stop as soon as John Hancoc your termination date from the RASC. Once payroll deductions stop, John Hancock will s information. If you do not continue your long-term you may not be able to enroll in another program comparable benefits and costs. Think carefully about continuing your long-term care billing and options at 800.888.3734.	
MetLife Pet, Auto and Home Insurance	Coverage is portable.	Your termination does not affect your group home and automobile coverage. However, your premium may be slightly higher without the payroll deduction discount. You will be billed each month by MetLife for the cost of your coverage if you decide to continue coverage.	Payroll deductions will stop as soon as MetLife Auto and Home receives your termination date from the RASC. Once payroll deductions stop, MetLife Auto and Home will send you billing information. Review the benefit options and decide if they still meet your needs. Contact MetLife at http://mybenefits.metlife.com or 800.438.6388 for home and auto.
MetLife Legal Plans	Active plan participation ends your last day worked.	MetLife Legal Plans may be continued for 12 months under an individual policy.	Contact MetLife directly at 800.821.6400 within 30 days of your last day worked. To continue coverage, you are required to pay the full premium for 12 months in advance. For more information visit www.legalplans.com or mybenefits.metlife.com. Note: Even if you do not elect to continue the Group Legal Plan coverage, the Plan will cover the legal fees for those covered services that were opened and in process on your last day worked.
Bright Horizons Back-up Care	Active plan participation ends your last day worked.	None	No action required.



Other	When It Ends	Options Available	What You Need To Do
Programs			
Vacation and Floating Holidays	Earning of vacation ends the last day worked.	Any unused, earned vacation days and unused floating holidays through your last day of work will be paid out to you in a lump sum, within the next regular payroll cycle following your last day worked.	To verify your unused vacation balance, talk to your manager or Human Resources business partner.
Tuition Assistance & Executive MBA Programs	Eligibility ends on your last day worked.	The Service Agreement you signed specifies your obligation to repay the Company according to a reimbursement schedule in Policy Number 800-02-17.	Employees who do not reimburse the company per the Service Agreement will not be considered for rehire. Additionally, if references are requested by an outside employer, the Company will indicate the employee is not eligible for rehire.
Voluntary Deductions (United Way, Savings Bonds)	Deductions end when your pay stops.	Your elected voluntary contributions will continue to be deducted from your final paycheck(s).	No action required. Deductions end with your last paycheck.
Car Allowance	Eligibility ends on your last day worked.	Your payments will end as of your last day worked.	No action required. Payments end with your last paycheck.
Bravo Points Redemption	Points may be redeemed after your last day worked.	After leaving Rockwell Automation, all employees retain previously earned Bravo points and access to redeem points using the shopping catalog.	Visit rockwellautomation.performnet.com and log in using your Active Directory Login ID and password previously set up in the Bravo platform. If you forgot your password, click on "Forgot Password," then answer your security question. If you did not previously set up a security question, send an email including your Employee ID to rabravo@biworldwide.com . The Bravo service team will respond with a new password.



For employees terminating on or after Dec. 1, 2023 Appendix: Rockwell Automation COBRA and Retiree Medical Rates

Medical	2024 MONTHLY COBRA RATES			
Option	You Only	You + Spouse	You + Children	Family
Broad Access Plan (UHC)	\$775.72	\$1,629.02	\$1,473.87	\$2,327.17
Broad Access HSA (UHC)	\$720.58	\$1,513.23	\$1,369.11	\$2,161.75
High-Performance Plan (Centivo)	\$746.70	\$1,568.07	\$1,418.73	\$2,240.11
CIGNA International	\$690.35	\$1,657.45	\$1,548.05	\$2,267.35

Dental	2024 MONTHLY COBRA RATES				
Option	You Only	You + Spouse	You + Children	Family	
Delta Dental Basic	\$30.59	\$67.96	\$67.96	\$89.30	
Delta Dental Comprehensive	\$48.13	\$108.42	\$108.42	\$144.79	
CIGNA International	\$54.14	\$108.23	\$139.68	\$189.55	

Vision	2024 MONTHLY COBRA RATES					
Option	You Only	You + Spouse	You + Children	Family		
Vision (UHC)	\$ 4.57	\$ 8.46	\$ 10.57	\$ 14.79		

Note: Family rates apply if you cover a Domestic Partner.

The Summary of Benefits and Coverage, and Summary Plan Descriptions, are available on Your Benefits Resources. Be sure to review the details annually if you re-enroll.



For employees terminating on or after Dec. 1, 2023 Appendix: Rockwell Automation COBRA and Retiree Medical Rates

RETIREE MONTHLY RATES¹

UHC Broad Access HSA

UHC Broad Access

Years of Service at Retirement	Single ²	You + Spouse	You + Children or Spouse + Children	Family	Single ²	You + Spouse	You + Children or Spouse + Children	Family	Child Only
No Subsidy **	\$978.83	\$1,957.66	\$1,301.84	\$2,280.67	\$1,036.29	\$2,072.58	\$1,378.27	\$2,414.56	\$341.98
10-14	\$499.75	\$999.50	\$664.66	\$1,164.41	\$557.21	\$1,114.42	\$741.09	\$1,298.30	\$183.88
15-19	\$460.83	\$921.66	\$612.90	\$1,073.73	\$518.29	\$1,036.58	\$689.33	\$1,207.62	\$171.04
20-24	\$421.81	\$843.62	\$561.00	\$982.81	\$479.27	\$958.54	\$637.43	\$1,116.70	\$158.16
25+ Years	\$414.07	\$828.14	\$550.71	\$964.78	\$471.53	\$943.06	\$627.14	\$1,098.67	\$155.61

¹Costs are subject to change each year, and the costs for the following calendar year are made available each fall during the Annual Enrollment period.

²Single costs are for Retiree Only or Spouse Only coverage.

You must have attained age 55 and ten years of service <u>and</u> have at least 75 age-service points to be eligible for retiree medical. Refer to the Summary Plan Description for complete details.

Refer to the Retirement Guide on raquickfind.com or contact the Rockwell Alight Service Center at 877.687.7272 for more information about retiree medical.

^{**}Rates if you are eligible and your most recent hire or rehire date is Jan. 1, 2005, or later.