

Aon Active Health Exchange™

2023 Employee Benefits New Hire Guide

Welcome to IDEX! We are proud to offer a competitive benefits package and a variety of plan options so that you can choose the right plan for you and your family, as applicable. This guide is an overview of the benefits that are available to you and the steps you should take to ensure you have the coverage that you need.

make it yours



Get the coverage you need.

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Health Care Benefits

If you are a regular employee and work 20 or more hours per week, you are eligible to enroll in health care benefits. Your benefits become effective on your date of hire. You may also enroll your eligible dependents in the Medical, Dental, and Vision plans, as applicable. Verification of dependent eligibility will be required upon enrollment.

Eligible dependents include:

- your legal spouse or domestic partner
- your children, up to age 26
- your children, of any age, who are physically or mentally disabled and incapable of supporting themselves and can be claimed as a dependent on your U.S. federal income tax return



Medical and Prescription Drug Benefits

IDEX provides several coverage level options, so you can select how you pay for your medical insurance now and if something occurs in the future. Each coverage level is available from different insurance carriers at different costs.

- Bronze—A high-deductible option with prescription drug coinsurance that makes you eligible for a Health Savings Account (HSA)
- Bronze Plus—A buy-up to the Bronze option—a high-deductible option with prescription drug coinsurance that makes you eligible for an HSA
- Silver—A high-deductible option with prescription drug coinsurance that makes you eligible for an HSA
- Gold—A lower-deductible option with prescription drug copays
- Platinum—A low-deductible option with prescription drug copays that covers in-network care and offers limited benefits for out-of-network care (or, for some insurance carriers in CA, CO, DC, GA, MD, OR, VA, and WA, an HMO option with prescription drug copays that covers in-network care only)

Please refer to the next page for details on the coverage level options.

Note: If you live in California, your options will be different, depending on the insurance carrier you choose. **Learn more** about your California coverage options and insurance carriers by visiting the Make It Yours website at <https://idex.makeityoursource.com/medical/california-medical-coverage-level>.

| MEDICAL COVERAGE LEVEL OPTIONS | BRONZE | BRONZE PLUS | SILVER | GOLD | PLATINUM |
|--|------------------------------|------------------------------|------------------------------|---|---|
| Annual Deductible (individual/family) | \$3,300/\$6,600 | \$2,450/\$4,900 | \$1,500/\$3,000 | \$800/\$1,600 | \$250/\$500 |
| Coinsurance (what the plan pays after deductible) | 75% | 75% | 75% | 75% | 85% |
| Doctor's office visit | You pay 25% after deductible | You pay 25% after deductible | You pay 25% after deductible | \$25 copay for PCP visit; \$40 copay for specialist visit | \$25 copay for PCP visit; \$40 copay for specialist visit |
| Annual Out-of-Pocket Maximum (individual/family) | \$6,400/\$12,800 | \$3,900/\$7,800 | \$3,800/\$7,600 | \$3,600/\$7,200 | \$2,300/\$4,600 |
| Employee premiums | \$ | \$ | \$\$ | \$\$\$ | \$\$\$\$ |
| Is a Health Savings Account available? | Yes | Yes | Yes | No | No |
| Deductible and Out-of-Pocket Maximum: Traditional or true family? | Traditional | True family | True family | Traditional | Traditional |

To learn more about how deductibles work, go to the Make It Yours website at <https://idex.makeityoursource.com/medical/how-deductibles-work>.

If you enroll under Aetna, Blue Cross Blue Shield of Illinois, Cigna, or UnitedHealthcare, your pharmacy benefits will be managed by CVS Caremark. For all other carriers, the pharmacy benefits will be managed by that carrier.

| PRESCRIPTION TYPE | BRONZE, BRONZE PLUS, SILVER | GOLD | | PLATINUM | |
|---|---|--------------------|---------------------|--------------------|---------------------|
| | 30-Day Retail and 90-Day Mail Order | 30-Day Retail | 90-Day Mail Order | 30-Day Retail | 90-Day Mail Order |
| Preventive Drugs | You pay \$0 You must have a doctor's prescription for the medication—even for products sold over the counter—and you must use an in-network retail pharmacy or mail order service. | | | | |
| Tier 1: Generally lowest cost options | You pay 100% until you've met the deductible, then you pay 25% | You pay \$10 copay | You pay \$25 copay | You pay \$8 copay | You pay \$20 copay |
| Tier 2: Generally medium cost options | You pay 100% until you've met the deductible, then you pay 25% | You pay \$40 copay | You pay \$100 copay | You pay \$30 copay | You pay \$75 copay |
| Tier 3: Generally highest cost options | You pay 100% until you've met the deductible, then you pay 25% | You pay \$60 copay | You pay \$150 copay | You pay \$50 copay | You pay \$125 copay |

You can find more details about your coverage options on the Make It Yours website at <https://idex.makeityoursource.com/medical/medical-coverage-level>.

IDEX Wellness Program

If you enroll in a medical plan through IDEX, you and your covered spouse/domestic partner are eligible to participate in the IDEX Wellness Program through Bravo Wellness. If you successfully complete the program requirements by the applicable deadline, you will receive a monthly wellness credit as soon as administratively feasible after your program completion is received.

| Hire Date | Time Frame to Complete Requirements |
|----------------------------------|-------------------------------------|
| November 2, 2022 – March 1, 2023 | November 2, 2022 – April 30, 2023 |
| After March 1, 2023 | New Hire program in August 2023 |

You can earn **up to \$75/month** and your spouse/domestic partner may earn **up to \$37.50/month**, based on the goals met. If you do not meet a goal for any reason, there may be an alternative accommodation or you can submit an appeal. Please refer to the program for specific details.

| Criteria | Goals | Employee Reward | Spouse/Domestic Partner Reward |
|--|---|-----------------|--------------------------------|
| Health Screening and Online Assessment | Complete Both Must be completed to unlock all reward opportunities | \$25/month | \$12.50/month |
| Body Mass Index (BMI) | ≤ 27 | \$5/month | \$2.50/month |
| Blood Pressure | ≤ 130 over 85 | \$5/month | \$2.50/month |
| Glucose | ≤ 105 or HbA1c ≤ 6% | \$5/month | \$2.50/month |
| LDL Cholesterol | ≤ 130 Or HDL Cholesterol ≥ 40 for males and ≥ 50 for females | \$5/month | \$2.50/month |
| Tobacco/Nicotine | Negative | \$5/month | \$2.50/month |
| Preventative Care Form | Complete | \$15/month | \$7.50/month |
| Cleveland Clinic One-Time Consult | Complete | \$10/month | \$5/month |

Create an account and sign up for your online Health Assessment by visiting <http://my.bravowell.com/idx>. You can also download the Bravo Wellness LLC 2.0 mobile app from the Apple App Store and Google Play.

Note: You and your covered spouse/domestic partner must create individual accounts.

Dental Benefits

Just like your medical coverage, you choose the dental coverage level and insurance carrier that are right for you. You can find these details and more on the Make It Yours website at <https://idex.makeityoursource.com/dental/dental-coverage-level>.

| DENTAL COVERAGE LEVEL OPTIONS | BRONZE | SILVER | GOLD |
|--|------------------------------|--|---|
| Annual Deductible (individual/family) | \$100/\$300 | \$100/\$300 | \$50/\$150 |
| Annual Maximum (excludes orthodontia) | \$1,000 per person | \$1,500 per person | \$2,500 per person |
| Preventive and Diagnostics | 100%, no deductible | | |
| Minor restorative care (e.g., root canal, gum disease treatment, oral surgery) | You pay 20% after deductible | | |
| Major Care (e.g., implants, dentures, crowns) | Not covered | You pay 40% after deductible | You pay 20% after deductible |
| Orthodontia | Not covered | You pay 50%, no deductible; children up to age 19 only | You pay 50%, no deductible; for children and adults |
| Orthodontia Lifetime Maximum | Not covered | \$1,500 per child | \$2,000 per person |

Vision Benefits

Just like your medical and dental coverage, you choose the vision coverage level and insurance carrier that are right for you. You can find these details and more on the Make It Yours website at <https://idex.makeityoursource.com/vision/vision-coverage-level>.

| VISION COVERAGE LEVEL OPTIONS | BRONZE | SILVER | GOLD |
|---|---|-------------------------------|-------------------------------|
| Exams (once every 12 months) | Covered 100% | You pay \$20 | You pay \$10 |
| Glasses Frames (once per plan year)/Single vision lenses (once per plan year) | Discount may apply | \$130 allowance*/You pay \$20 | \$200 allowance*/You pay \$10 |
| Contact Lenses (once per plan year) Medically Necessary/ Elective | Not covered | You pay \$20/\$130 allowance* | You pay \$10/\$200 allowance* |
| Laser Surgery | 15% off regular price or 5% off promotional price | | |

*Allowance can be used for frames or elective contact lenses, but not both.



Savings and Spending Benefits

Health Savings Account (HSA)

If you enroll in a high-deductible medical plan, IDEX includes a Health Savings Account (HSA), which allows you to contribute pre-tax dollars to an account to pay for qualified health care expenses. The money in the account is yours to keep, and funds roll over from year to year. For 2023, your contributions may total up to \$3,850 for single coverage per year and \$7,750 for family coverage per year. If you're age 55 or older (or will turn age 55 during the plan year), you can also make additional pre-tax "catch-up" contributions to your HSA up to \$1,000. When your HSA balance is over \$1,000 you are able to start investing your funds. The monthly administration fees to invest your HSA funds are paid for by IDEX.

Flexible Spending Accounts (FSAs)

IDEX offers three Flexible Spending Accounts that can help you save for qualified health care and/or dependent care expenses: the Health Care FSA, the Limited Purpose FSA, and the Dependent Care FSA. You are eligible to contribute to the Health Care FSA if you are enrolled in the Platinum or Gold plans. If you enroll in the Silver, Bronze Plus, or Bronze plan, you are eligible for the Limited Purpose FSA. The Limited Purpose FSA can be used for dental and vision expenses only. You may contribute to a Dependent Care FSA regardless of which medical plan you choose. You can roll over up to the IRS maximum amount from year to year, and you must re-elect your contribution amount each year during the enrollment period. For 2023, you may contribute up to \$3,050 per year to the Health Care FSA, and up to \$5,000 per year to the Dependent Care FSA. The Limited Purpose FSA follows the same guidelines as the Health Care FSA.



IDEX Corporation Savings Plan

The IDEX Corporation Savings Plan offers two valuable employer contributions: the IDEX 401(k) employer matching contribution and the DC contribution.

401(k) Pre-tax Employee Contribution and IDEX Matching Contribution

The Retirement Savings Plan allows you to save through pre-tax payroll contributions. IDEX matches the first 8% of your contributions at 50% of your contribution to a maximum of 4%. If you do not make an election within 31 days after your date of hire, you will be automatically enrolled in the 401(k) Plan with a 4% contribution. Each subsequent January, your contribution will be increased by 1% until your total contribution is equal to 8%. Once you make an election, the automatic enrollment process does not apply. Visit www.vanguard.com to set your contribution amount. The employer matching contribution vests 20% each year and is fully vested after five years of service.

DC Contribution

The DC Contribution is fully funded by IDEX, with no employee contributions required. The DC contribution is based on a percentage of your eligible earnings. The contribution percentage is calculated based on your age + years of service. You are fully vested in your DC contribution after three years of service.

| Total of Your Age + Years of Service* | % of Your Eligible Earnings |
|---------------------------------------|-----------------------------|
| Less than 40 | 3.50% |
| 40 up to 55 | 4.00% |
| 55 up to 70 | 4.50% |
| 70 or more | 5.00% |

* Employee's age and service are truncated to whole years prior to being added together.



More Options

Company-Paid Insurance Programs

- **Short-Term Disability**
IDEX provides Short-Term Disability benefits that replace a portion of your income if you are unable to work due to an illness or injury. Benefits begin after five days of disability and last for up to 180 days. It provides 100% salary continuation for the first 90 days of a qualified disability, then 60% salary continuation for days 91-180.
- **Life Insurance/AD&D Insurance**
IDEX provides company-paid life insurance equal to 1x your annual base salary.
- **Dependent Life Insurance**
IDEX provides dependent life insurance in the amount of \$10,000 for any eligible dependents.
- **Employee Assistance Program**
IDEX offers an Employee Assistance Program through ComPsych.
- **\$100,000 Business Accident Travel Policy**



Voluntary Benefit Programs

IDEX offers additional benefits for you to purchase and enhance your coverage at a low cost. Voluntary programs include:

- **Long-Term Disability**
Long-Term Disability benefits allow you to insure a portion of your salary at a low monthly rate. It provides ongoing benefits equal to 60% of your income, up to a maximum benefit of \$15,000 monthly, in the event that you are unable to work 180 days after an eligible disability.
- **The Hartford Group Accident Insurance**
Accident insurance pays a benefit in the event you or a family member covered under this plan is in an accident.
- **The Hartford Critical Illness Insurance**
This insurance provides a lump-sum benefit if a health emergency occurs such as being treated for a major medical event or diagnosis of a critical illness.
- **Hospital Indemnity Insurance**
Hospital indemnity insurance provides a lump-sum benefit in the event you or a family member covered under this plan is hospitalized.
- **Norton LifeLock Identity Theft Protection**
You can choose between two plans, Benefit Essential and Benefit Premier.
- **Personal Accident Insurance**
Personal accident insurance provides an additional life insurance benefit in the event that you or your dependents (if elected) die from an accident.
- **Supplemental Life Insurance/AD&D Insurance**
You can supplement your IDEX company-paid life insurance by purchasing additional life insurance at your own expense.

Alight Advocacy Services

Sometimes you need more help than your insurance carrier can provide. Through the benefits that IDEX provides, you have access to Alight Advocacy Services at no cost to you. Alight Health Pros are experts in handling and resolving your claims and billing issues. Take advantage of this service to help you navigate the health care system and save on your out-of-pocket costs.

- Understand your benefits: Clear up any confusion about your health plan.
- Verify care coverage: Get help verifying coverage before your appointments.
- Transfer medical records: Get assistance transferring your medical records.
- Resolve billing errors: Have questions about your medical bills? Alight Health Pros can help!
- Schedule appointments: Have your appointments scheduled at times most convenient for you.

Once your coverage begins, email a Health Pro at AlightHealthPro@alight.com or call **1.866.300.6530**.



Additional IDEX Benefits

Employee Stock Purchase Plan (ESPP)

The Employee Stock Purchase Plan (ESPP) allows you to purchase IDEX Company stock through payroll deductions. Owning IDEX shares is one way to save for retirement or future expenses. You can contribute as little as \$1 per month up to a maximum of \$750 per month. Sign up any time at digital.alight.com/idx and access your account at www.computershare.com/investor.

Tuition Reimbursement Program

IDEX wants to equip you for future development and growth. If you are a regular full-time or part-time employee regularly scheduled to work at least 20 hours per week and are in good standing with at least six months of service, you are eligible to participate in the Tuition Reimbursement Program. The program offers reimbursement of certain expenses for secondary educational institutions up to \$5,250 per year, the maximum amount allowed as exempt from tax withholdings.

Matching Gift Program

With the IDEX Matching Gift Program, you can support the educational institutions of your choice. If you are a full-time employee with at least six months of service, IDEX will match your gift of at least \$50 to an accredited school located in the U.S., dollar for dollar, to a maximum of \$10,000 per person per year.

Parental Leave

U.S. regular, non-union, full-time or part-time employees who are regularly scheduled to work at least 20 hours per week are eligible for IDEX Parental Leave benefits after completing at least 90 consecutive days of full-time employment. Parental Leave is provided so you can bond with your newborn or newly adopted child.

Eligible employees may take up to a maximum of six weeks of paid Parental Leave during the 12-month period immediately following the birth or new adoption of a child. Parental Leave taken under this policy is compensated at 100% of your regular, straight-time pay and will be paid on your regular payroll cycle.

Please refer to the Parental Leave policy for more information.

PNC WorkPlace Banking

Helps support your financial wellbeing through virtual banking, financial wellness education, and personal advising. Learn more at www.pnc.com/workplace/employee.





How to Enroll

If you have an IDEX email address, be on the lookout for an email inviting you to enroll in your benefits during your first couple of weeks of work. If you do not have an IDEX email address, please call the IDEX Benefits Center at **1.855.750.2924** for help with enrollment.

Electing or Waiving Coverage

You have 31 days from the date of your hire to elect your benefits. If you DO NOT elect benefits during this period, you WILL NOT have medical (including prescription drug), dental or vision coverage during the calendar year. Note that you will not be able to change this election until Open Enrollment, or if you experience a qualified status change.

Health Care Benefits

Go to the IDEX Benefits Portal at digital.alight.com/idx and click **Enroll Now**. Use the **Help Me Choose** tool for personalized coverage suggestions that meet your needs and budget. You may return at any time to change your elections until your enrollment period ends.

Retirement Benefits

A packet from Vanguard will be mailed to your home with enrollment instructions. If you do not make a 401(k) election within your first 31 days, you will be automatically enrolled in the plan with a 4% contribution. The contribution will be increased by 1% on the first of the year until the contribution is set to 8%.





For More Information

Alight Mobile App

Access your benefits, enroll from anywhere, and more with the **Alight Mobile** app available through the Apple App Store or Google Play.



Make It Yours Website

Visit the Make It Yours website at idex.makeityoursource.com for:

Information about your available options, things to consider, and practical tips to get the most out of your benefits

- Verify care coverage: Get help verifying coverage before your appointments.
- Frequently asked questions
- Links to insurance carrier “preview” websites to help you get up to speed on each carrier’s provider networks, prescription drug information, and other programs as you consider carriers

Additional Help

Log on to the IDEX Benefits Portal at digital.alight.com/idex and look for the “Need Help?” icon to ask Lisa, your virtual assistant, any questions you may have. Lisa can also connect you with a web chat representative and other helpful resources. For additional support, you can schedule an appointment with a customer service representative through the IDEX Benefits Portal.



Benefits Contacts

| PROGRAM | CARRIER OR PROVIDER | CARRIER OR PROVIDER PHONE | CONTACT INFORMATION |
|---|---|---------------------------|---|
| IDEX Benefits Center | | | |
| | Alight | 1-855-750-2924 | digital.alight.com/index |
| Alight Advocacy Services | | | |
| | Alight Health Pros | 1-866-300-6530 | |
| Medical | | | |
| | Aetna | 1-855-496-6289 | https://www.aetna.com/aon/fi/2023 |
| | Blue Cross Blue Shield (BCBS) of Illinois | 1-855-212-1617 | https://www.bcbsil.com/aonsi |
| | Cigna | 1-855-694-9638 | https://connections.cigna.com/aonactivehealth-withyou-2023/ |
| | Dean/Prevea360 | 1-877-232-9375 | http://aon.deanhealthplan.com/ |
| | Geisinger | 1-844-390-8332 | https://geisinger.org/aon |
| | Kaiser (CA, CO, DC, GA, MD, OR, VA) | 1-877-580-6125 | https://www.kp.org/aon |
| | Kaiser (WA) | 1-855-407-0900 | https://kp.org/aon |
| | Medical Mutual of Ohio | 1-800-677-8028 | http://www.medmutual.com/aon |
| | Priority Health | 1-833-207-3211 | https://www.priorityhealth.com/aon |
| | UnitedHealthcare | 1-888-297-0878 | https://eims.uhc.com/aon8 |
| | UPMC Health | 1-844-252-0690 | https://www.upmchealthplan.com/aon/ |
| Prescription Drug | | | |
| | CVS/Caremark (if using Aetna, BCBS, Cigna, or UnitedHealthcare for medical coverage) | 1-866-425-5916 | www.caremark.com |
| | Contact medical carrier if using a different carrier than Aetna, BCBS, Cigna, or UnitedHealthcare | Reference Above | Reference Above |
| Wellness | | | |
| | Bravo Wellness | 1-844-925-2782 | https://www.bravowell.com/ |
| Dental | | | |
| | Aetna | 1-855-496-6289 | https://www.aetna.com/aon/fi/2023 |
| | Cigna | 1-855-694-9638 | https://connections.cigna.com/aonactivehealth-withyou-2023/ |
| | Delta Dental of IL | 1-800-323-1743 | http://ddil.deltadentalexchange.com/ |
| | MetLife | 1-888-309-5526 | https://www.metlife.com/aon-exchange |
| | UnitedHealthcare | 1-888-571-5218 | https://eims.uhc.com/aon7 |
| Vision | | | |
| | EyeMed | 1-844-739-9837 | https://eyemed.com/en-us/exchange-aon |
| | MetLife | 1-888-309-5526 | https://www.metlife.com/aon-exchange |
| | UnitedHealthcare | 1-888-571-5218 | https://eims.uhc.com/aon7 |
| | VSP | 1-877-478-7559 | http://aon.vspexchange.com |
| Flexible Spending Accounts (FSAs) & Health Savings Account (HSA) | | | |
| | Alight Smart Choice Accounts | 1-855-750-2924 | digital.alight.com/IDEX |
| IDEX Corporation Savings Plan | | | |
| | Vanguard | 1-800-523-1188 | www.vanguard.com |

Benefits Contacts

| PROGRAM | CARRIER OR PROVIDER | CARRIER OR PROVIDER PHONE | CONTACT INFORMATION |
|---|---------------------|------------------------------------|---|
| Company-Paid Insurance Programs | | | |
| Dependent Life Insurance Short-term disability Life/AD&D | The Hartford | 1-888-301-5615 | https://www.thehartford.com/ |
| Employee Assistance Program | ComPsych | 1-800-96-HELPS (1-800-964-3577) | www.guidanceresources.com ; Web ID: HLF902 |
| Voluntary Benefits | | | |
| Accident Critical Illness Hospital Indemnity Long-term disability Personal Accident Supplemental Life/AD&D | The Hartford | 1-888-301-5615 | https://www.thehartford.com/ |
| Identify Theft | Norton LifeLock | | https://www.lifelockbusinessolutions.com/EmployeeBenefits/Benefitplans |
| Employee Stock Purchase Plan (ESPP) | | | |
| | Computershare | 1-866-282-4944 | www.computershare.com |