



Pension Plan and Trust of the Roman Catholic Archdiocese of Boston

The Trustees of the Pension Plan and Trust of the Roman Catholic Archdiocese of Boston (the “Plan”) terminated the Plan as of April 15, 2025.

To comply with relevant laws governing retirement plans, the Plan has been amended and an application will be filed with the Internal Revenue Service on July 23, 2025 to request a determination as to the qualified status of the Plan upon termination. The attached Notice to Interested Parties is being provided to notify interested parties of this IRS filing.

A paper version of the notice can be obtained upon request for no charge.

If you have any questions regarding this Notice, please call Carol Gustavson, the Plan Administrator, at (617) 746-5830, or cgustavson@rcab.org.

NOTICE TO INTERESTED PARTIES

PENSION PLAN AND TRUST OF THE ROMAN CATHOLIC ARCHDIOCESE OF BOSTON

JUNE 30, 2025

Notice to: All present employees with an accrued benefit under the Pension Plan and Trust of the Roman Catholic Archdiocese of Boston, all former employees with vested benefits, alternate payees under a qualified domestic relations order with an accrued benefit in the Plan, and all beneficiaries of deceased former employees currently receiving benefits under the Plan.

An application is to be made to the Internal Revenue Service for an advance determination on the qualification of the following employee benefit plan:

Name of Plan: Pension Plan and Trust of the Roman Catholic Archdiocese of Boston

Plan Number: 001

Name of Applicant: Roman Catholic Archbishop of Boston, A Corporation Sole

Address of Applicant: Pastoral Center of the Archdiocese of Boston
66 Brooks Drive
Braintree, MA 02184

Applicant EIN: 04-2777359

Name and Address of Plan Administrator: Ms. Carol Gustavson
Director-Benefit Trusts/Plan Administrator
66 Brooks Drive
Braintree, MA 02184

The application will be filed on July 23, 2025 for an advance determination as to whether the Pension Plan and Trust of the Roman Catholic Archdiocese of Boston (the "Plan") meets the qualification requirements of Section 401 of the Internal Revenue Code of 1986, with respect to the plan's termination.

The application will be filed with:

Internal Revenue Service
Attention: EP Determination Letters
P.O. Box 12192
TE'GE Stop 31A Team 105
Covington, KY 41012-0192

Employees eligible to participate in the Plan:

All employees who first performed an hour of service on or before December 1, 2010, became Participants on the first day of the first month following the earlier of (i) completion of three years of service or (ii) attainment of age 21 and completion of either (x) 1000 hours of service credit during the first 12 months following the date the employee first completed his hour of service or (y) one year of service credit, but only if the eligibility period under (i) or (ii) was satisfied by December 31, 2011. Effective December 31, 2011, participation and benefit accruals were frozen.

Certain employees in training periods, such as student teachers, and cooperative employees, as well as those performing services normally performed by clergy were not eligible to participate in the Plan.

The Internal Revenue Service has previously issued a determination letter with respect to the qualification of this plan. This Plan is not subject to ERISA.

RIGHTS OF INTERESTED PARTIES

You have the right to submit to EP Determinations, at the above address, either individually or jointly with other interested parties, your comments as to whether this plan meets the qualification requirements of the Internal Revenue Code. Label your comments "Interested Party Statement." Include the EIN, Plan name and Plan number in your correspondence. Also, include your contact information (mailing address and phone number) in case the IRS needs to contact you. Your comments to EP determinations should be faxed to EP Customer Service at (855) 224-1311 or mailed to:

Internal Revenue Service
EP Determinations
Attn: Customer Service Manager
P.O. Box 2508
Cincinnati, OH 45202

COMMENTS TO THE INTERNAL REVENUE SERVICE

Comments submitted by you to EP Determinations must be in writing and received by it by September 6, 2025.

ADDITIONAL INFORMATION

Detailed instructions regarding the requirements for notification of interested parties may be found in sections 19A and 20A of Revenue Procedure 2025-4, 2025-1 IRB 158. Additional information concerning this application (including, where applicable, an updated copy of the plan and related trust; the application for determination; any additional documents relating to the application that have been submitted to the Service; and copies of section 19A of Revenue Procedure 2025-4) are available from Ms. Gustavson, Director-Benefit Trusts/Plan Administrator, Pastoral Center of the Archdiocese of Boston, 66 Brooks Drive, Braintree, MA 02184. (There is a nominal charge for copying and/or mailing.)