

Summer

Pricing for Sourcewell Participating Entities

Summer is offering the following concessions to all Sourcewell participating entities:

- 50% reduction in Summer's minimum contract requirement for Summer Core and/or Summer Contribution, which reduces the annual minimum to \$5,000 for each participating entity.
- 24% reduction in Summer's Per Employee Per Month (PEPM) pricing for both Summer Core and Summer Contribution, reflected in the price listing below.

1) Summer Core

For the Summer Core offering, pricing is based on the number of eligible employees (EEs) at the participating entity per employee per month (PEPM):

Eligible Employees	PEPM
<4,999	\$1.25
5,000-9,999	\$1.10
10,000-24,999	\$0.95
25,000-74,999	\$0.80
75,000+	\$0.65

- Summer Core provides all eligible employees with access to Summer's team of trained experts for one-on-one counseling via phone, live chat, email, and text message support.
- Summer Core provides employees with full access to Summer's comprehensive suite of digital assistance tools and resources for college cost and student loan repayment navigation. This includes, but is not limited to (1) customized repayment recommendations, (2) end-to-end enrollment coverage for over 120 loan assistance and forgiveness programs, (3) Summer's refinancing marketplace, (4) college planning tools, (5) an extensive resource center, and more.
- The Core offering also includes coverage for up to 3 family members per employee, which typically increases benefit utilization by 15-20% due to the broader need for assistance across the household.

2) Summer Contribution

For Sourcewell participating entities that wish to include Summer Contribution to facilitate payments to employee's student loans and/or tuition costs of up to the tax-advantaged \$5,250 annual limit per

individual, there is an addition PEPM of:

Eligible Employees	PEPM
<4,999	\$0.50
5,000-9,999	\$0.46
10,000-24,999	\$0.42
25,000-74,999	\$0.38
75,000+	\$0.34

- Most clients opt into adding Summer Contribution to Summer Core, although Sourcewell’s participating entities can choose to provide Summer Contribution as a standalone offering.