# Form 5500

Department of the Treasury
Internal Revenue Service

Department of Labor
Employee Benefits Security Administration

Pension Benefit Guaranty Corporation

# Annual Return/Report of Employee Benefit Plan

This form is required to be filed for employee benefit plans under sections 104 and 4065 of the Employee Retirement Income Security Act of 1974 (ERISA) and sections 6047(e), 6057(b), and 6058(a) of the Internal Revenue Code (the Code).

▶ **Complete all entries in accordance with the instructions to the Form 5500.**

OMB Nos. 1210-0110
1210-0089

**2012**

**This Form is Open to Public Inspection**

## Part I Annual Report Identification Information

For calendar plan year 2012 or fiscal plan year beginning 01/01/2012 and ending 12/31/2012

**A** This return/report is for:
- [ ] a multiemployer plan;
- [ ] a multiple-employer plan; or
- [X] a single-employer plan;
- [ ] a DFE (specify) ____

**B** This return/report is:
- [ ] the first return/report;
- [ ] the final return/report;
- [ ] an amended return/report;
- [ ] a short plan year return/report (less than 12 months).

**C** If the plan is a collectively-bargained plan, check here. . . . . ▶ [X]

**D** Check box if filing under:
- [X] Form 5558;
- [ ] automatic extension;
- [ ] the DFVC program;
- [ ] special extension (enter description)

## Part II Basic Plan Information—enter all requested information

**1a** Name of plan
PENSION PLAN FOR DISCONTINUED OPERATIONS OF ROBERT BOSCH

**1b** Three-digit plan number (PN) ▶ 010

**1c** Effective date of plan 05/01/1988

**2a** Plan sponsor's name and address; include room or suite number (employer, if for a single-employer plan)

ROBERT BOSCH LLC

2800 SOUTH 25TH AVENUE
BROADVIEW, IL 60155-4594

**2b** Employer Identification Number (EIN) 36-2903176

**2c** Sponsor's telephone number 708-865-5200

**2d** Business code (see instructions) 423100

**Caution: A penalty for the late or incomplete filing of this return/report will be assessed unless reasonable cause is established.**

Under penalties of perjury and other penalties set forth in the instructions, I declare that I have examined this return/report, including accompanying schedules, statements and attachments, as well as the electronic version of this return/report, and to the best of my knowledge and belief, it is true, correct, and complete.

| | | | |
|---|---|---|---|
| **SIGN HERE** | Filed with authorized/valid electronic signature. | 10/14/2013 | GARY D. GRABARCZYK |
| | **Signature of plan administrator** | Date | Enter name of individual signing as plan administrator |
| **SIGN HERE** | Filed with authorized/valid electronic signature. | 10/14/2013 | GARY D. GRABARCZYK |
| | **Signature of employer/plan sponsor** | Date | Enter name of individual signing as employer or plan sponsor |
| **SIGN HERE** | | | |
| | **Signature of DFE** | Date | Enter name of individual signing as DFE |

Preparer's name (including firm name, if applicable) and address; include room or suite number. (optional)

Preparer's telephone number (optional)

**3a** Plan administrator's name and address [X] Same as Plan Sponsor Name [ ] Same as Plan Sponsor Address

**3b** Administrator's EIN

**3c** Administrator's telephone number

**4** If the name and/or EIN of the plan sponsor has changed since the last return/report filed for this plan, enter the name, EIN and the plan number from the last return/report:

**a** Sponsor's name

**4b** EIN

**4c** PN

| | | | |
|---|---|---|---|
| **5** | Total number of participants at the beginning of the plan year | **5** | 3198 |
| **6** | Number of participants as of the end of the plan year (welfare plans complete only lines **6a, 6b, 6c,** and **6d**). | | |
| **a** | Active participants | **6a** | 188 |
| **b** | Retired or separated participants receiving benefits | **6b** | 1666 |
| **c** | Other retired or separated participants entitled to future benefits | **6c** | 1115 |
| **d** | Subtotal. Add lines **6a**, **6b**, and **6c** | **6d** | 2969 |
| **e** | Deceased participants whose beneficiaries are receiving or are entitled to receive benefits | **6e** | 111 |
| **f** | Total. Add lines **6d** and **6e** | **6f** | 3080 |
| **g** | Number of participants with account balances as of the end of the plan year (only defined contribution plans complete this item) | **6g** | |
| **h** | Number of participants that terminated employment during the plan year with accrued benefits that were less than 100% vested | **6h** | 0 |
| **7** | Enter the total number of employers obligated to contribute to the plan (only multiemployer plans complete this item) | **7** | |

**8a** If the plan provides pension benefits, enter the applicable pension feature codes from the List of Plan Characteristics Codes in the instructions:
1A 1B 1G 1I 3H

**b** If the plan provides welfare benefits, enter the applicable welfare feature codes from the List of Plan Characteristics Codes in the instructions:

**9a** Plan funding arrangement (check all that apply)

- **(1)** [ ] Insurance
- **(2)** [ ] Code section 412(e)(3) insurance contracts
- **(3)** [X] Trust
- **(4)** [ ] General assets of the sponsor

**9b** Plan benefit arrangement (check all that apply)

- **(1)** [ ] Insurance
- **(2)** [ ] Code section 412(e)(3) insurance contracts
- **(3)** [X] Trust
- **(4)** [ ] General assets of the sponsor

**10** Check all applicable boxes in 10a and 10b to indicate which schedules are attached, and, where indicated, enter the number attached. (See instructions)

**a Pension Schedules**

- **(1)** [X] **R** (Retirement Plan Information)
- **(2)** [ ] **MB** (Multiemployer Defined Benefit Plan and Certain Money Purchase Plan Actuarial Information) - signed by the plan actuary
- **(3)** [X] **SB** (Single-Employer Defined Benefit Plan Actuarial Information) - signed by the plan actuary

**b General Schedules**

- **(1)** [X] **H** (Financial Information)
- **(2)** [ ] **I** (Financial Information – Small Plan)
- **(3)** [ ] ___ **A** (Insurance Information)
- **(4)** [X] **C** (Service Provider Information)
- **(5)** [X] **D** (DFE/Participating Plan Information)
- **(6)** [ ] **G** (Financial Transaction Schedules)

# SCHEDULE SB (Form 5500)

Department of the Treasury
Internal Revenue Service

Department of Labor
Employee Benefits Security Administration

Pension Benefit Guaranty Corporation

# Single-Employer Defined Benefit Plan Actuarial Information

This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA) and section 6059 of the Internal Revenue Code (the Code).

▶ **File as an attachment to Form 5500 or 5500-SF.**

OMB No. 1210-0110

**2012**

**This Form is Open to Public Inspection**

For calendar plan year 2012 or fiscal plan year beginning 01/01/2012 and ending 12/31/2012

▶ **Round off amounts to nearest dollar.**

▶ **Caution:** A penalty of $1,000 will be assessed for late filing of this report unless reasonable cause is established.

**A** Name of plan
PENSION PLAN FOR DISCONTINUED OPERATIONS OF ROBERT BOSCH

**B** Three-digit plan number (PN) ▶ 010

**C** Plan sponsor's name as shown on line 2a of Form 5500 or 5500-SF
ROBERT BOSCH LLC

**D** Employer Identification Number (EIN)
36-2903176

**E** Type of plan: [X] Single [ ] Multiple-A [ ] Multiple-B

**F** Prior year plan size: [ ] 100 or fewer [ ] 101-500 [X] More than 500

## Part I Basic Information

| | | | | |
|---|---|---|---|---|
| 1 | Enter the valuation date: Month 01 Day 01 Year 2012 | | | |
| 2 | Assets: | | | |
| | a Market value | 2a | | 66413360 |
| | b Actuarial value | 2b | | 67569512 |
| 3 | Funding target/participant count breakdown: | | (1) Number of participants | (2) Funding Target |
| | a For retired participants and beneficiaries receiving payment | 3a | 1729 | 44582597 |
| | b For terminated vested participants | 3b | 1193 | 15236295 |
| | c For active participants: | | | |
| | (1) Non-vested benefits | 3c(1) | | 38395 |
| | (2) Vested benefits | 3c(2) | | 4616867 |
| | (3) Total active | 3c(3) | 277 | 4655262 |
| | d Total | 3d | 3199 | 64474154 |
| 4 | If the plan is in at-risk status, check the box and complete lines (a) and (b) [ ] | | | |
| | a Funding target disregarding prescribed at-risk assumptions | 4a | | |
| | b Funding target reflecting at-risk assumptions, but disregarding transition rule for plans that have been in at-risk status for fewer than five consecutive years and disregarding loading factor | 4b | | |
| 5 | Effective interest rate | 5 | | 6.94 % |
| 6 | Target normal cost | 6 | | 519269 |

**Statement by Enrolled Actuary**

To the best of my knowledge, the information supplied in this schedule and accompanying schedules, statements and attachments, if any, is complete and accurate. Each prescribed assumption was applied in accordance with applicable law and regulations. In my opinion, each other assumption is reasonable (taking into account the experience of the plan and reasonable expectations) and such other assumptions, in combination, offer my best estimate of anticipated experience under the plan.

**SIGN HERE**

Signature of actuary — Date: 09/04/2013

KAREN A. HIRSCHHORN
Type or print name of actuary

11-04099
Most recent enrollment number

HEWITT ASSOCIATES LLC
Firm name

847-295-5000
Telephone number (including area code)

4 OVERLOOK POINT
LINCOLNSHIRE, IL 60069-4302
Address of the firm

If the actuary has not fully reflected any regulation or ruling promulgated under the statute in completing this schedule, check the box and see instructions [ ]

## Part II Beginning of Year Carryover Prefunding Balances

| | | (a) Carryover balance | (b) Prefunding balance |
|---|---|---|---|
| 7 | Balance at beginning of prior year after applicable adjustments (line 13 from prior year) | 0 | 0 |
| 8 | Portion elected for use to offset prior year's funding requirement (line 35 from prior year) | 0 | 0 |
| 9 | Amount remaining (line 7 minus line 8) | 0 | 0 |
| 10 | Interest on line 9 using prior year's actual return of 1.08% | | |
| 11 | Prior year's excess contributions to be added to prefunding balance: | | |
| | a Present value of excess contributions (line 38a from prior year) | | 651251 |
| | b Interest on (a) using prior year's effective interest rate of 6.19% except as otherwise provided (see instructions) | | 40312 |
| | c Total available at beginning of current plan year to add to prefunding balance | | 691563 |
| | d Portion of (c) to be added to prefunding balance | | 0 |
| 12 | Other reductions in balances due to elections or deemed elections | 0 | 0 |
| 13 | Balance at beginning of current year (line 9 + line 10 + line 11d – line 12) | 0 | 0 |

## Part III Funding Percentages

| | | | |
|---|---|---|---|
| 14 | Funding target attainment percentage | 14 | 104.80 % |
| 15 | Adjusted funding target attainment percentage | 15 | 104.80 % |
| 16 | Prior year's funding percentage for purposes of determining whether carryover/prefunding balances may be used to reduce current year's funding requirement | 16 | 90.01 % |
| 17 | If the current value of the assets of the plan is less than 70 percent of the funding target, enter such percentage | 17 | % |

## Part IV Contributions and Liquidity Shortfalls

18 Contributions made to the plan for the plan year by employer(s) and employees:

| (a) Date (MM-DD-YYYY) | (b) Amount paid by employer(s) | (c) Amount paid by employees | (a) Date (MM-DD-YYYY) | (b) Amount paid by employer(s) | (c) Amount paid by employees |
|---|---|---|---|---|---|
| 04/13/2012 | 517801 | | | | |
| 05/31/2012 | 1463000 | | | | |
| 05/08/2013 | 713000 | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | Totals ► 18(b) | 2693801 | 18(c) 0 |

| | | | |
|---|---|---|---|
| 19 | Discounted employer contributions – see instructions for small plan with a valuation date after the beginning of the year: | | |
| | a Contributions allocated toward unpaid minimum required contributions from prior years. | 19a | 0 |
| | b Contributions made to avoid restrictions adjusted to valuation date | 19b | 0 |
| | c Contributions allocated toward minimum required contribution for current year adjusted to valuation date | 19c | 2582556 |

20 Quarterly contributions and liquidity shortfalls:

a Did the plan have a "funding shortfall" for the prior year? [X] Yes [ ] No

b If line 20a is "Yes," were required quarterly installments for the current year made in a timely manner? [X] Yes [ ] No

c If line 20a is "Yes," see instructions and complete the following table as applicable:

Liquidity shortfall as of end of quarter of this plan year

| (1) 1st | (2) 2nd | (3) 3rd | (4) 4th |
|---|---|---|---|
| 0 | | 0 | 0 |

## Part V Assumptions Used to Determine Funding Target and Target Normal Cost

**21** Discount rate:

**a** Segment rates:

| 1st segment: | 2nd segment: | 3rd segment: | |
|---|---|---|---|
| 5.54% | 6.85% | 7.52 % | ☐ N/A, full yield curve used |

| | | |
|---|---|---|
| **b** Applicable month (enter code) | **21b** | 4 |
| **22** Weighted average retirement age | **22** | 63 |

**23** Mortality table(s) (see instructions) ☐ Prescribed - combined ☒ Prescribed - separate ☐ Substitute

## Part VI Miscellaneous Items

| | | |
|---|---|---|
| **24** Has a change been made in the non-prescribed actuarial assumptions for the current plan year? If "Yes," see instructions regarding required attachment. | ☒ Yes | ☐ No |
| **25** Has a method change been made for the current plan year? If "Yes," see instructions regarding required attachment. | ☐ Yes | ☒ No |
| **26** Is the plan required to provide a Schedule of Active Participants? If "Yes," see instructions regarding required attachment. | ☒ Yes | ☐ No |

| | | |
|---|---|---|
| **27** If the plan is subject to alternative funding rules, enter applicable code and see instructions regarding attachment | **27** | |

## Part VII Reconciliation of Unpaid Minimum Required Contributions For Prior Years

| | | |
|---|---|---|
| **28** Unpaid minimum required contributions for all prior years | **28** | 0 |
| **29** Discounted employer contributions allocated toward unpaid minimum required contributions from prior years (line 19a) | **29** | 0 |
| **30** Remaining amount of unpaid minimum required contributions (line 28 minus line 29) | **30** | 0 |

## Part VIII Minimum Required Contribution For Current Year

**31** Target normal cost and excess assets (see instructions):

| | | |
|---|---|---|
| **a** Target normal cost (line 6) | **31a** | 519269 |
| **b** Excess assets, if applicable, but not greater than line 31a | **31b** | 519269 |

**32** Amortization installments:

| | Outstanding Balance | Installment |
|---|---|---|
| **a** Net shortfall amortization installment | 0 | 0 |
| **b** Waiver amortization installment | 0 | 0 |

| | | |
|---|---|---|
| **33** If a waiver has been approved for this plan year, enter the date of the ruling letter granting the approval (Month _____ Day _____ Year _____) and the waived amount | **33** | 0 |
| **34** Total funding requirement before reflecting carryover/prefunding balances (lines 31a - 31b + 32a + 32b - 33) | **34** | 0 |

| | Carryover balance | Prefunding balance | Total balance |
|---|---|---|---|
| **35** Balances elected for use to offset funding requirement | 0 | 0 | 0 |

| | | |
|---|---|---|
| **36** Additional cash requirement (line 34 minus line 35) | **36** | 0 |
| **37** Contributions allocated toward minimum required contribution for current year adjusted to valuation date (line 19c) | **37** | 2582556 |

**38** Present value of excess contributions for current year (see instructions)

| | | |
|---|---|---|
| **a** Total (excess, if any, of line 37 over line 36) | **38a** | 2582556 |
| **b** Portion included in line 38a attributable to use of prefunding and funding standard carryover balances | **38b** | 0 |
| **39** Unpaid minimum required contribution for current year (excess, if any, of line 36 over line 37) | **39** | 0 |
| **40** Unpaid minimum required contributions for all years | **40** | 0 |

## Part IX Pension Funding Relief Under Pension Relief Act of 2010 (See Instructions)

**41** If an election was made to use PRA 2010 funding relief for this plan:

**a** Schedule elected ☐ 2 plus 7 years ☐ 15 years

**b** Eligible plan year(s) for which the election in line 41a was made ☐ 2008 ☐ 2009 ☐ 2010 ☐ 2011

| | | |
|---|---|---|
| **42** Amount of acceleration adjustment | **42** | |
| **43** Excess installment acceleration amount to be carried over to future plan years | **43** | |

| SCHEDULE C (Form 5500) | Service Provider Information | OMB No. 1210-0110 |
|---|---|---|
| Department of the Treasury<br>Internal Revenue Service<br>Department of Labor<br>Employee Benefits Security Administration<br>Pension Benefit Guaranty Corporation | This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA).<br>▶ **File as an attachment to Form 5500.** | **2012**<br>**This Form is Open to Public Inspection.** |

For calendar plan year 2012 or fiscal plan year beginning 01/01/2012 and ending 12/31/2012

**A** Name of plan
PENSION PLAN FOR DISCONTINUED OPERATIONS OF ROBERT BOSCH

**B** Three-digit plan number (PN) ▶ 010

**C** Plan sponsor's name as shown on line 2a of Form 5500
ROBERT BOSCH LLC

**D** Employer Identification Number (EIN)
36-2903176

## Part I Service Provider Information (see instructions)

You must complete this Part, in accordance with the instructions, to report the information required for **each person** who received, directly or indirectly, $5,000 or more in total compensation (i.e., money or anything else of monetary value) in connection with services rendered to the plan or the person's position with the plan during the plan year. If a person received **only** eligible indirect compensation for which the plan received the required disclosures, you are required to answer line 1 but are not required to include that person when completing the remainder of this Part.

### 1 Information on Persons Receiving Only Eligible Indirect Compensation

**a** Check "Yes" or "No" to indicate whether you are excluding a person from the remainder of this Part because they received only eligible indirect compensation for which the plan received the required disclosures (see instructions for definitions and conditions).. . . . . ☐ Yes ☒ No

**b** If you answered line 1a "Yes," enter the name and EIN or address of each person providing the required disclosures for the service providers who received only eligible indirect compensation. Complete as many entries as needed (see instructions).

**(b)** Enter name and EIN or address of person who provided you disclosures on eligible indirect compensation

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**2. Information on Other Service Providers Receiving Direct or Indirect Compensation.** Except for those persons for whom you answered "Yes" to line 1a above, complete as many entries as needed to list each person receiving, directly or indirectly, $5,000 or more in total compensation (i.e., money or anything else of value) in connection with services rendered to the plan or their position with the plan during the plan year. (See instructions).

**(a)** Enter name and EIN or address (see instructions)

| (b) Service Code(s) | (c) Relationship to employer, employee organization, or person known to be a party-in-interest | (d) Enter direct compensation paid by the plan. If none, enter -0-. | (e) Did service provider receive indirect compensation? (sources other than plan or plan sponsor) | (f) Did indirect compensation include eligible indirect compensation, for which the plan received the required disclosures? | (g) Enter total indirect compensation received by service provider excluding eligible indirect compensation for which you answered "Yes" to element (f). If none, enter -0-. | (h) Did the service provider give you a formula instead of an amount or estimated amount? |
|---|---|---|---|---|---|---|
| | | | Yes ☐ No ☐ | Yes ☐ No ☐ | | Yes ☐ No ☐ |

**(a)** Enter name and EIN or address (see instructions)

| (b) Service Code(s) | (c) Relationship to employer, employee organization, or person known to be a party-in-interest | (d) Enter direct compensation paid by the plan. If none, enter -0-. | (e) Did service provider receive indirect compensation? (sources other than plan or plan sponsor) | (f) Did indirect compensation include eligible indirect compensation, for which the plan received the required disclosures? | (g) Enter total indirect compensation received by service provider excluding eligible indirect compensation for which you answered "Yes" to element (f). If none, enter -0-. | (h) Did the service provider give you a formula instead of an amount or estimated amount? |
|---|---|---|---|---|---|---|
| | | | Yes ☐ No ☐ | Yes ☐ No ☐ | | Yes ☐ No ☐ |

**(a)** Enter name and EIN or address (see instructions)

| (b) Service Code(s) | (c) Relationship to employer, employee organization, or person known to be a party-in-interest | (d) Enter direct compensation paid by the plan. If none, enter -0-. | (e) Did service provider receive indirect compensation? (sources other than plan or plan sponsor) | (f) Did indirect compensation include eligible indirect compensation, for which the plan received the required disclosures? | (g) Enter total indirect compensation received by service provider excluding eligible indirect compensation for which you answered "Yes" to element (f). If none, enter -0-. | (h) Did the service provider give you a formula instead of an amount or estimated amount? |
|---|---|---|---|---|---|---|
| | | | Yes ☐ No ☐ | Yes ☐ No ☐ | | Yes ☐ No ☐ |

**2. Information on Other Service Providers Receiving Direct or Indirect Compensation.** Except for those persons for whom you answered "Yes" to line 1a above, complete as many entries as needed to list each person receiving, directly or indirectly, $5,000 or more in total compensation (i.e., money or anything else of value) in connection with services rendered to the plan or their position with the plan during the plan year. (See instructions).

**(a)** Enter name and EIN or address (see instructions)

| (b) Service Code(s) | (c) Relationship to employer, employee organization, or person known to be a party-in-interest | (d) Enter direct compensation paid by the plan. If none, enter -0-. | (e) Did service provider receive indirect compensation? (sources other than plan or plan sponsor) | (f) Did indirect compensation include eligible indirect compensation, for which the plan received the required disclosures? | (g) Enter total indirect compensation received by service provider excluding eligible indirect compensation for which you answered "Yes" to element (f). If none, enter -0-. | (h) Did the service provider give you a formula instead of an amount or estimated amount? |
|---|---|---|---|---|---|---|
| | | | Yes ☐ No ☐ | Yes ☐ No ☐ | | Yes ☐ No ☐ |

**(a)** Enter name and EIN or address (see instructions)

| (b) Service Code(s) | (c) Relationship to employer, employee organization, or person known to be a party-in-interest | (d) Enter direct compensation paid by the plan. If none, enter -0-. | (e) Did service provider receive indirect compensation? (sources other than plan or plan sponsor) | (f) Did indirect compensation include eligible indirect compensation, for which the plan received the required disclosures? | (g) Enter total indirect compensation received by service provider excluding eligible indirect compensation for which you answered "Yes" to element (f). If none, enter -0-. | (h) Did the service provider give you a formula instead of an amount or estimated amount? |
|---|---|---|---|---|---|---|
| | | | Yes ☐ No ☐ | Yes ☐ No ☐ | | Yes ☐ No ☐ |

**(a)** Enter name and EIN or address (see instructions)

| (b) Service Code(s) | (c) Relationship to employer, employee organization, or person known to be a party-in-interest | (d) Enter direct compensation paid by the plan. If none, enter -0-. | (e) Did service provider receive indirect compensation? (sources other than plan or plan sponsor) | (f) Did indirect compensation include eligible indirect compensation, for which the plan received the required disclosures? | (g) Enter total indirect compensation received by service provider excluding eligible indirect compensation for which you answered "Yes" to element (f). If none, enter -0-. | (h) Did the service provider give you a formula instead of an amount or estimated amount? |
|---|---|---|---|---|---|---|
| | | | Yes ☐ No ☐ | Yes ☐ No ☐ | | Yes ☐ No ☐ |

## Part I Service Provider Information (continued)

**3** If you reported on line 2 receipt of indirect compensation, other than eligible indirect compensation, by a service provider, and the service provider is a fiduciary or provides contract administrator, consulting, custodial, investment advisory, investment management, broker, or recordkeeping services, answer the following questions for (a) each source from whom the service provider received $1,000 or more in indirect compensation and (b) each source for whom the service provider gave you a formula used to determine the indirect compensation instead of an amount or estimated amount of the indirect compensation. Complete as many entries as needed to report the required information for each source.

| **(a)** Enter service provider name as it appears on line 2 | **(b)** Service Codes (see instructions) | **(c)** Enter amount of indirect compensation |
|---|---|---|
| | | |
| **(d)** Enter name and EIN (address) of source of indirect compensation | **(e)** Describe the indirect compensation, including any formula used to determine the service provider's eligibility for or the amount of the indirect compensation. | |
| | | |

| **(a)** Enter service provider name as it appears on line 2 | **(b)** Service Codes (see instructions) | **(c)** Enter amount of indirect compensation |
|---|---|---|
| | | |
| **(d)** Enter name and EIN (address) of source of indirect compensation | **(e)** Describe the indirect compensation, including any formula used to determine the service provider's eligibility for or the amount of the indirect compensation. | |
| | | |

| **(a)** Enter service provider name as it appears on line 2 | **(b)** Service Codes (see instructions) | **(c)** Enter amount of indirect compensation |
|---|---|---|
| | | |
| **(d)** Enter name and EIN (address) of source of indirect compensation | **(e)** Describe the indirect compensation, including any formula used to determine the service provider's eligibility for or the amount of the indirect compensation. | |
| | | |

## Part II Service Providers Who Fail or Refuse to Provide Information

**4** Provide, to the extent possible, the following information for each service provider who failed or refused to provide the information necessary to complete this Schedule.

| (a) Enter name and EIN or address of service provider (see instructions) | (b) Nature of Service Code(s) | (c) Describe the information that the service provider failed or refused to provide |
|---|---|---|
| | | |

| (a) Enter name and EIN or address of service provider (see instructions) | (b) Nature of Service Code(s) | (c) Describe the information that the service provider failed or refused to provide |
|---|---|---|
| | | |

| (a) Enter name and EIN or address of service provider (see instructions) | (b) Nature of Service Code(s) | (c) Describe the information that the service provider failed or refused to provide |
|---|---|---|
| | | |

| (a) Enter name and EIN or address of service provider (see instructions) | (b) Nature of Service Code(s) | (c) Describe the information that the service provider failed or refused to provide |
|---|---|---|
| | | |

| (a) Enter name and EIN or address of service provider (see instructions) | (b) Nature of Service Code(s) | (c) Describe the information that the service provider failed or refused to provide |
|---|---|---|
| | | |

| (a) Enter name and EIN or address of service provider (see instructions) | (b) Nature of Service Code(s) | (c) Describe the information that the service provider failed or refused to provide |
|---|---|---|
| | | |

## Part III Termination Information on Accountants and Enrolled Actuaries (see instructions)

(complete as many entries as needed)

**a** Name: NICOLE M. STOPOULOS

**b** EIN: 23-1159360

**c** Position: ACTUARY

**d** Address: TOWERS WATSON PENNSYLVANIA, INC.
191 N WACKER DRIVE, SUITE 2100
CHICAGO, IL 60606

**e** Telephone: 312-525-2500

Explanation: ROBERT BOSCH CHANGED ACTUARIES TO AON HEWITT TO HAVE A GLOBAL ACTUARY.

**a** Name:

**b** EIN:

**c** Position:

**d** Address:

**e** Telephone:

Explanation:

**a** Name:

**b** EIN:

**c** Position:

**d** Address:

**e** Telephone:

Explanation:

**a** Name:

**b** EIN:

**c** Position:

**d** Address:

**e** Telephone:

Explanation:

**a** Name:

**b** EIN:

**c** Position:

**d** Address:

**e** Telephone:

Explanation:

# SCHEDULE D (Form 5500)

Department of the Treasury
Internal Revenue Service

Department of Labor
Employee Benefits Security Administration

## DFE/Participating Plan Information

This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA).

▶ **File as an attachment to Form 5500.**

OMB No. 1210-0110

**2012**

**This Form is Open to Public Inspection.**

For calendar plan year 2012 or fiscal plan year beginning 01/01/2012 and ending 12/31/2012

**A** Name of plan
PENSION PLAN FOR DISCONTINUED OPERATIONS OF ROBERT BOSCH

**B** Three-digit plan number (PN) ▶ 010

**C** Plan or DFE sponsor's name as shown on line 2a of Form 5500
ROBERT BOSCH LLC

**D** Employer Identification Number (EIN)
36-2903176

**Part I** **Information on interests in MTIAs, CCTs, PSAs, and 103-12 IEs (to be completed by plans and DFEs)**
(Complete as many entries as needed to report all interests in DFEs)

**a** Name of MTIA, CCT, PSA, or 103-12 IE: ROBERT BOSCH LLC MASTER RET TRUST

**b** Name of sponsor of entity listed in (a): ROBERT BOSCH LLC

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|
| 36-2903176-100 | M | 69012715 |

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|
| | | |

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|
| | | |

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|
| | | |

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|
| | | |

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|
| | | |

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|

**a** Name of MTIA, CCT, PSA, or 103-12 IE:

**b** Name of sponsor of entity listed in (a):

| **c** EIN-PN | **d** Entity code | **e** Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) |
|---|---|---|

## Part II Information on Participating Plans (to be completed by DFEs)

(Complete as many entries as needed to report all participating plans)

**a** Plan name

| **b** Name of plan sponsor | **c** EIN-PN |
|---|---|

**a** Plan name

| **b** Name of plan sponsor | **c** EIN-PN |
|---|---|

**a** Plan name

| **b** Name of plan sponsor | **c** EIN-PN |
|---|---|

**a** Plan name

| **b** Name of plan sponsor | **c** EIN-PN |
|---|---|

**a** Plan name

| **b** Name of plan sponsor | **c** EIN-PN |
|---|---|

**a** Plan name

| **b** Name of plan sponsor | **c** EIN-PN |
|---|---|

**a** Plan name

| **b** Name of plan sponsor | **c** EIN-PN |
|---|---|

**a** Plan name

| **b** Name of plan sponsor | **c** EIN-PN |
|---|---|

**a** Plan name

| **b** Name of plan sponsor | **c** EIN-PN |
|---|---|

**a** Plan name

| **b** Name of plan sponsor | **c** EIN-PN |
|---|---|

**a** Plan name

| **b** Name of plan sponsor | **c** EIN-PN |
|---|---|

**a** Plan name

| **b** Name of plan sponsor | **c** EIN-PN |
|---|---|

**a** Plan name

| **b** Name of plan sponsor | **c** EIN-PN |
|---|---|

# SCHEDULE H (Form 5500)

Department of the Treasury
Internal Revenue Service

Department of Labor
Employee Benefits Security Administration

Pension Benefit Guaranty Corporation

# Financial Information

This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA), and section 6058(a) of the Internal Revenue Code (the Code).

▶ **File as an attachment to Form 5500.**

OMB No. 1210-0110

**2012**

**This Form is Open to Public Inspection**

For calendar plan year 2012 or fiscal plan year beginning 01/01/2012 and ending 12/31/2012

**A** Name of plan
PENSION PLAN FOR DISCONTINUED OPERATIONS OF ROBERT BOSCH

**B** Three-digit plan number (PN) ▶ 010

**C** Plan sponsor's name as shown on line 2a of Form 5500
ROBERT BOSCH LLC

**D** Employer Identification Number (EIN)
36-2903176

## Part I Asset and Liability Statement

**1** Current value of plan assets and liabilities at the beginning and end of the plan year. Combine the value of plan assets held in more than one trust. Report the value of the plan's interest in a commingled fund containing the assets of more than one plan on a line-by-line basis unless the value is reportable on lines 1c(9) through 1c(14). Do not enter the value of that portion of an insurance contract which guarantees, during this plan year, to pay a specific dollar benefit at a future date. **Round off amounts to the nearest dollar.** MTIAs, CCTs, PSAs, and 103-12 IEs do not complete lines 1b(1), 1b(2), 1c(8), 1g, 1h, and 1i. CCTs, PSAs, and 103-12 IEs also do not complete lines 1d and 1e. See instructions.

| Assets | | (a) Beginning of Year | (b) End of Year |
|---|---|---|---|
| **a** Total noninterest-bearing cash | 1a | | |
| **b** Receivables (less allowance for doubtful accounts): | | | |
| **(1)** Employer contributions | 1b(1) | 699000 | 713000 |
| **(2)** Participant contributions | 1b(2) | | |
| **(3)** Other | 1b(3) | | |
| **c** General investments: | | | |
| **(1)** Interest-bearing cash (include money market accounts & certificates of deposit) | 1c(1) | | |
| **(2)** U.S. Government securities | 1c(2) | | |
| **(3)** Corporate debt instruments (other than employer securities): | | | |
| **(A)** Preferred | 1c(3)(A) | | |
| **(B)** All other | 1c(3)(B) | | |
| **(4)** Corporate stocks (other than employer securities): | | | |
| **(A)** Preferred | 1c(4)(A) | | |
| **(B)** Common | 1c(4)(B) | | |
| **(5)** Partnership/joint venture interests | 1c(5) | | |
| **(6)** Real estate (other than employer real property) | 1c(6) | | |
| **(7)** Loans (other than to participants) | 1c(7) | | |
| **(8)** Participant loans | 1c(8) | | |
| **(9)** Value of interest in common/collective trusts | 1c(9) | | |
| **(10)** Value of interest in pooled separate accounts | 1c(10) | | |
| **(11)** Value of interest in master trust investment accounts | 1c(11) | 65731514 | 69012715 |
| **(12)** Value of interest in 103-12 investment entities | 1c(12) | | |
| **(13)** Value of interest in registered investment companies (e.g., mutual funds) | 1c(13) | | |
| **(14)** Value of funds held in insurance company general account (unallocated contracts) | 1c(14) | | |
| **(15)** Other | 1c(15) | | |

| | | | (a) Beginning of Year | (b) End of Year |
|---|---|---|---|---|
| **1d** | Employer-related investments: | | | |
| | **(1)** Employer securities | 1d(1) | | |
| | **(2)** Employer real property | 1d(2) | | |
| **e** | Buildings and other property used in plan operation | 1e | | |
| **f** | Total assets (add all amounts in lines 1a through 1e) | 1f | 66430514 | 69725715 |
| | **Liabilities** | | | |
| **g** | Benefit claims payable | 1g | | |
| **h** | Operating payables | 1h | 84446 | 124283 |
| **i** | Acquisition indebtedness | 1i | | |
| **j** | Other liabilities | 1j | | |
| **k** | Total liabilities (add all amounts in lines 1g through1j) | 1k | 84446 | 124283 |
| | **Net Assets** | | | |
| **l** | Net assets (subtract line 1k from line 1f) | 1l | 66346068 | 69601432 |

## Part II Income and Expense Statement

**2** Plan income, expenses, and changes in net assets for the year. Include all income and expenses of the plan, including any trust(s) or separately maintained fund(s) and any payments/receipts to/from insurance carriers. Round off amounts to the nearest dollar. MTIAs, CCTs, PSAs, and 103-12 IEs do not complete lines 2a, 2b(1)(E), 2e, 2f, and 2g.

| | Income | | (a) Amount | (b) Total |
|---|---|---|---|---|
| **a** | **Contributions:** | | | |
| | **(1)** Received or receivable in cash from: **(A)** Employers | 2a(1)(A) | 2693801 | |
| | **(B)** Participants | 2a(1)(B) | | |
| | **(C)** Others (including rollovers) | 2a(1)(C) | | |
| | **(2)** Noncash contributions | 2a(2) | | |
| | **(3)** Total contributions. Add lines **2a(1)(A), (B), (C),** and line **2a(2)** | 2a(3) | | 2693801 |
| **b** | **Earnings on investments:** | | | |
| | **(1)** Interest: | | | |
| | **(A)** Interest-bearing cash (including money market accounts and certificates of deposit) | 2b(1)(A) | | |
| | **(B)** U.S. Government securities | 2b(1)(B) | | |
| | **(C)** Corporate debt instruments | 2b(1)(C) | | |
| | **(D)** Loans (other than to participants) | 2b(1)(D) | | |
| | **(E)** Participant loans | 2b(1)(E) | | |
| | **(F)** Other | 2b(1)(F) | | |
| | **(G)** Total interest. Add lines **2b(1)(A)** through **(F)** | 2b(1)(G) | | 0 |
| | **(2)** Dividends: **(A)** Preferred stock | 2b(2)(A) | | |
| | **(B)** Common stock | 2b(2)(B) | | |
| | **(C)** Registered investment company shares (e.g. mutual funds) | 2b(2)(C) | | |
| | **(D)** Total dividends. Add lines **2b(2)(A)**, **(B)**, and **(C)** | 2b(2)(D) | | 0 |
| | **(3)** Rents | 2b(3) | | |
| | **(4)** Net gain (loss) on sale of assets: **(A)** Aggregate proceeds | 2b(4)(A) | | |
| | **(B)** Aggregate carrying amount (see instructions) | 2b(4)(B) | | |
| | **(C)** Subtract line **2b(4)(B)** from line **2b(4)(A)** and enter result | 2b(4)(C) | | 0 |
| | **(5)** Unrealized appreciation (depreciation) of assets: **(A)** Real estate | 2b(5)(A) | | |
| | **(B)** Other | 2b(5)(B) | | |
| | **(C)** Total unrealized appreciation of assets. Add lines **2b(5)(A)** and **(B)** | 2b(5)(C) | | 0 |

| | | (a) Amount | (b) Total |
|---|---|---|---|
| (6) Net investment gain (loss) from common/collective trusts | 2b(6) | | |
| (7) Net investment gain (loss) from pooled separate accounts | 2b(7) | | |
| (8) Net investment gain (loss) from master trust investment accounts | 2b(8) | | 7720963 |
| (9) Net investment gain (loss) from 103-12 investment entities | 2b(9) | | |
| (10) Net investment gain (loss) from registered investment companies (e.g., mutual funds) | 2b(10) | | |
| c Other income | 2c | | |
| d Total income. Add all **income** amounts in column (b) and enter total | 2d | | 10414764 |
| **Expenses** | | | |
| e Benefit payment and payments to provide benefits: | | | |
| (1) Directly to participants or beneficiaries, including direct rollovers | 2e(1) | 6423980 | |
| (2) To insurance carriers for the provision of benefits | 2e(2) | | |
| (3) Other | 2e(3) | | |
| (4) Total benefit payments. Add lines **2e(1)** through **(3)** | 2e(4) | | 6423980 |
| f Corrective distributions (see instructions) | 2f | | |
| g Certain deemed distributions of participant loans (see instructions) | 2g | | |
| h Interest expense | 2h | | |
| i Administrative expenses: **(1)** Professional fees | 2i(1) | 577626 | |
| (2) Contract administrator fees | 2i(2) | | |
| (3) Investment advisory and management fees | 2i(3) | 157794 | |
| (4) Other | 2i(4) | | |
| (5) Total administrative expenses. Add lines **2i(1)** through **(4)** | 2i(5) | | 735420 |
| j Total expenses. Add all **expense** amounts in column (b) and enter total | 2j | | 7159400 |
| **Net Income and Reconciliation** | | | |
| k Net income (loss). Subtract line **2j** from line **2d** | 2k | | 3255364 |
| l Transfers of assets: | | | |
| (1) To this plan | 2l(1) | | |
| (2) From this plan | 2l(2) | | |

## Part III Accountant's Opinion

**3** Complete lines 3a through 3c if the opinion of an independent qualified public accountant is attached to this Form 5500. Complete line 3d if an opinion is not attached.

**a** The attached opinion of an independent qualified public accountant for this plan is (see instructions):

**(1)** [ ] Unqualified **(2)** [ ] Qualified **(3)** [X] Disclaimer **(4)** [ ] Adverse

**b** Did the accountant perform a limited scope audit pursuant to 29 CFR 2520.103-8 and/or 103-12(d)? [X] Yes [ ] No

**c** Enter the name and EIN of the accountant (or accounting firm) below:

**(1)** Name: PRICEWATERHOUSECOOPERS, LLP **(2)** EIN: 13-4008324

**d** The opinion of an independent qualified public accountant is **not attached** because:

**(1)** [ ] This form is filed for a CCT, PSA, or MTIA. **(2)** [ ] It will be attached to the next Form 5500 pursuant to 29 CFR 2520.104-50.

## Part IV Compliance Questions

**4** CCTs and PSAs do not complete Part IV. MTIAs, 103-12 IEs, and GIAs do not complete lines 4a, 4e, 4f, 4g, 4h, 4k, 4m, 4n, or 5. 103-12 IEs also do not complete lines 4j and 4l. MTIAs also do not complete line 4l.

During the plan year:

| | | Yes | No | Amount |
|---|---|---|---|---|
| **a** Was there a failure to transmit to the plan any participant contributions within the time period described in 29 CFR 2510.3-102? Continue to answer "Yes" for any prior year failures until fully corrected. (See instructions and DOL's Voluntary Fiduciary Correction Program.) | 4a | | X | |
| **b** Were any loans by the plan or fixed income obligations due the plan in default as of the close of the plan year or classified during the year as uncollectible? Disregard participant loans secured by participant's account balance. (Attach Schedule G (Form 5500) Part I if "Yes" is checked.) | 4b | | X | |

| | | | Yes | No | Amount |
|---|---|---|---|---|---|
| c | Were any leases to which the plan was a party in default or classified during the year as uncollectible? (Attach Schedule G (Form 5500) Part II if "Yes" is checked.) | 4c | | X | |
| d | Were there any nonexempt transactions with any party-in-interest? (Do not include transactions reported on line 4a. Attach Schedule G (Form 5500) Part III if "Yes" is checked.) | 4d | | X | |
| e | Was this plan covered by a fidelity bond? | 4e | X | | 15000000 |
| f | Did the plan have a loss, whether or not reimbursed by the plan's fidelity bond, that was caused by fraud or dishonesty? | 4f | | X | |
| g | Did the plan hold any assets whose current value was neither readily determinable on an established market nor set by an independent third party appraiser? | 4g | | X | |
| h | Did the plan receive any noncash contributions whose value was neither readily determinable on an established market nor set by an independent third party appraiser? | 4h | | X | |
| i | Did the plan have assets held for investment? (Attach schedule(s) of assets if "Yes" is checked, and see instructions for format requirements.) | 4i | | X | |
| j | Were any plan transactions or series of transactions in excess of 5% of the current value of plan assets? (Attach schedule of transactions if "Yes" is checked, and see instructions for format requirements.) | 4j | | X | |
| k | Were all the plan assets either distributed to participants or beneficiaries, transferred to another plan, or brought under the control of the PBGC? | 4k | | X | |
| l | Has the plan failed to provide any benefit when due under the plan? | 4l | | X | |
| m | If this is an individual account plan, was there a blackout period? (See instructions and 29 CFR 2520.101-3.) | 4m | | | |
| n | If 4m was answered "Yes," check the "Yes" box if you either provided the required notice or one of the exceptions to providing the notice applied under 29 CFR 2520.101-3. | 4n | | | |

**5a** Has a resolution to terminate the plan been adopted during the plan year or any prior plan year?
If "Yes," enter the amount of any plan assets that reverted to the employer this year ☐ **Yes** ☒ **No** **Amount:**

**5b** If, during this plan year, any assets or liabilities were transferred from this plan to another plan(s), identify the plan(s) to which assets or liabilities were transferred. (See instructions.)

| **5b(1)** Name of plan(s) | **5b(2)** EIN(s) | **5b(3)** PN(s) |
|---|---|---|
| | | |
| | | |
| | | |

## Part V Trust Information (optional)

| **6a** Name of trust | **6b** Trust's EIN |
|---|---|
| | |

# SCHEDULE R (Form 5500)

Department of the Treasury
Internal Revenue Service

Department of Labor
Employee Benefits Security Administration

Pension Benefit Guaranty Corporation

# Retirement Plan Information

This schedule is required to be filed under section 104 and 4065 of the Employee Retirement Income Security Act of 1974 (ERISA) and section 6058(a) of the Internal Revenue Code (the Code).

▶ **File as an attachment to Form 5500.**

OMB No. 1210-0110

**2012**

**This Form is Open to Public Inspection.**

For calendar plan year 2012 or fiscal plan year beginning 01/01/2012 and ending 12/31/2012

**A** Name of plan
PENSION PLAN FOR DISCONTINUED OPERATIONS OF ROBERT BOSCH

**B** Three-digit plan number (PN) ▶ 010

**C** Plan sponsor's name as shown on line 2a of Form 5500
ROBERT BOSCH LLC

**D** Employer Identification Number (EIN)
36-2903176

## Part I Distributions

**All references to distributions relate only to payments of benefits during the plan year.**

**1** Total value of distributions paid in property other than in cash or the forms of property specified in the instructions ..... **1** 0

**2** Enter the EIN(s) of payor(s) who paid benefits on behalf of the plan to participants or beneficiaries during the year (if more than two, enter EINs of the two payors who paid the greatest dollar amounts of benefits):

EIN(s): 36-3046063

**Profit-sharing plans, ESOPs, and stock bonus plans, skip line 3.**

**3** Number of participants (living or deceased) whose benefits were distributed in a single sum, during the plan year. ..... **3** 66

## Part II Funding Information (If the plan is not subject to the minimum funding requirements of section of 412 of the Internal Revenue Code or ERISA section 302, skip this Part)

**4** Is the plan administrator making an election under Code section 412(d)(2) or ERISA section 302(d)(2)? ..... ☐ **Yes** ☒ **No** ☐ **N/A**

**If the plan is a defined benefit plan, go to line 8.**

**5** If a waiver of the minimum funding standard for a prior year is being amortized in this plan year, see instructions and enter the date of the ruling letter granting the waiver. **Date:** Month _____ Day _____ Year _____

**If you completed line 5, complete lines 3, 9, and 10 of Schedule MB and do not complete the remainder of this schedule.**

**6** **a** Enter the minimum required contribution for this plan year (include any prior year accumulated funding deficiency not waived) ..... **6a**

**b** Enter the amount contributed by the employer to the plan for this plan year ..... **6b**

**c** Subtract the amount in line 6b from the amount in line 6a. Enter the result (enter a minus sign to the left of a negative amount) ..... **6c**

**If you completed line 6c, skip lines 8 and 9.**

**7** Will the minimum funding amount reported on line 6c be met by the funding deadline? ..... ☐ **Yes** ☐ **No** ☐ **N/A**

**8** If a change in actuarial cost method was made for this plan year pursuant to a revenue procedure or other authority providing automatic approval for the change or a class ruling letter, does the plan sponsor or plan administrator agree with the change? ..... ☐ **Yes** ☐ **No** ☒ **N/A**

## Part III Amendments

**9** If this is a defined benefit pension plan, were any amendments adopted during this plan year that increased or decreased the value of benefits? If yes, check the appropriate box. If no, check the "No" box. ..... ☒ **Increase** ☐ **Decrease** ☐ **Both** ☐ **No**

## Part IV ESOPs (see instructions). If this is not a plan described under Section 409(a) or 4975(e)(7) of the Internal Revenue Code, skip this Part.

**10** Were unallocated employer securities or proceeds from the sale of unallocated securities used to repay any exempt loan? ..... ☐ **Yes** ☐ **No**

**11** **a** Does the ESOP hold any preferred stock? ..... ☐ **Yes** ☐ **No**

**b** If the ESOP has an outstanding exempt loan with the employer as lender, is such loan part of a "back-to-back" loan? (See instructions for definition of "back-to-back" loan.) ..... ☐ **Yes** ☐ **No**

**12** Does the ESOP hold any stock that is not readily tradable on an established securities market? ..... ☐ **Yes** ☐ **No**

## Part V Additional Information for Multiemployer Defined Benefit Pension Plans

**13** Enter the following information for each employer that contributed more than 5% of total contributions to the plan during the plan year (measured in dollars). See instructions. *Complete as many entries as needed to report all applicable employers.*

**a** Name of contributing employer

**b** EIN **c** Dollar amount contributed by employer

**d** Date collective bargaining agreement expires *(If employer contributes under more than one collective bargaining agreement, check box* ☐ *and see instructions regarding required attachment. Otherwise, enter the applicable date.)* Month _____ Day _____ Year _____

**e** Contribution rate information *(If more than one rate applies, check this box* ☐ *and see instructions regarding required attachment. Otherwise, complete lines 13e(1) and 13e(2).)*
(1) Contribution rate (in dollars and cents) _____
(2) Base unit measure: ☐ Hourly ☐ Weekly ☐ Unit of production ☐ Other (specify):

---

**a** Name of contributing employer

**b** EIN **c** Dollar amount contributed by employer

**d** Date collective bargaining agreement expires *(If employer contributes under more than one collective bargaining agreement, check box* ☐ *and see instructions regarding required attachment. Otherwise, enter the applicable date.)* Month _____ Day _____ Year _____

**e** Contribution rate information *(If more than one rate applies, check this box* ☐ *and see instructions regarding required attachment. Otherwise, complete lines 13e(1) and 13e(2).)*
(1) Contribution rate (in dollars and cents) _____
(2) Base unit measure: ☐ Hourly ☐ Weekly ☐ Unit of production ☐ Other (specify): _____

---

**a** Name of contributing employer

**b** EIN **c** Dollar amount contributed by employer

**d** Date collective bargaining agreement expires *(If employer contributes under more than one collective bargaining agreement, check box* ☐ *and see instructions regarding required attachment. Otherwise, enter the applicable date.)* Month _____ Day _____ Year _____

**e** Contribution rate information *(If more than one rate applies, check this box* ☐ *and see instructions regarding required attachment. Otherwise, complete lines 13e(1) and 13e(2).)*
(1) Contribution rate (in dollars and cents) _____
(2) Base unit measure: ☐ Hourly ☐ Weekly ☐ Unit of production ☐ Other (specify): _____

---

**a** Name of contributing employer

**b** EIN **c** Dollar amount contributed by employer

**d** Date collective bargaining agreement expires *(If employer contributes under more than one collective bargaining agreement, check box* ☐ *and see instructions regarding required attachment. Otherwise, enter the applicable date.)* Month _____ Day _____ Year _____

**e** Contribution rate information *(If more than one rate applies, check this box* ☐ *and see instructions regarding required attachment. Otherwise, complete lines 13e(1) and 13e(2).)*
(1) Contribution rate (in dollars and cents) _____
(2) Base unit measure: ☐ Hourly ☐ Weekly ☐ Unit of production ☐ Other (specify): _____

---

**a** Name of contributing employer

**b** EIN **c** Dollar amount contributed by employer

**d** Date collective bargaining agreement expires *(If employer contributes under more than one collective bargaining agreement, check box* ☐ *and see instructions regarding required attachment. Otherwise, enter the applicable date.)* Month _____ Day _____ Year _____

**e** Contribution rate information *(If more than one rate applies, check this box* ☐ *and see instructions regarding required attachment. Otherwise, complete lines 13e(1) and 13e(2).)*
(1) Contribution rate (in dollars and cents) _____
(2) Base unit measure: ☐ Hourly ☐ Weekly ☐ Unit of production ☐ Other (specify): _____

---

**a** Name of contributing employer

**b** EIN **c** Dollar amount contributed by employer

**d** Date collective bargaining agreement expires *(If employer contributes under more than one collective bargaining agreement, check box* ☐ *and see instructions regarding required attachment. Otherwise, enter the applicable date.)* Month _____ Day _____ Year _____

**e** Contribution rate information *(If more than one rate applies, check this box* ☐ *and see instructions regarding required attachment. Otherwise, complete lines 13e(1) and 13e(2).)*
(1) Contribution rate (in dollars and cents) _____
(2) Base unit measure: ☐ Hourly ☐ Weekly ☐ Unit of production ☐ Other (specify): _____

**14** Enter the number of participants on whose behalf no contributions were made by an employer as an employer of the participant for:

| | | |
|---|---|---|
| **a** The current year | **14a** | |
| **b** The plan year immediately preceding the current plan year | **14b** | |
| **c** The second preceding plan year | **14c** | |

**15** Enter the ratio of the number of participants under the plan on whose behalf no employer had an obligation to make an employer contribution during the current plan year to:

| | | |
|---|---|---|
| **a** The corresponding number for the plan year immediately preceding the current plan year | **15a** | |
| **b** The corresponding number for the second preceding plan year | **15b** | |

**16** Information with respect to any employers who withdrew from the plan during the preceding plan year:

| | | |
|---|---|---|
| **a** Enter the number of employers who withdrew during the preceding plan year | **16a** | |
| **b** If line 16a is greater than 0, enter the aggregate amount of withdrawal liability assessed or estimated to be assessed against such withdrawn employers | **16b** | |

**17** If assets and liabilities from another plan have been transferred to or merged with this plan during the plan year, check box and see instructions regarding supplemental information to be included as an attachment. ☐

## Part VI Additional Information for Single-Employer and Multiemployer Defined Benefit Pension Plans

**18** If any liabilities to participants or their beneficiaries under the plan as of the end of the plan year consist (in whole or in part) of liabilities to such participants and beneficiaries under two or more pension plans as of immediately before such plan year, check box and see instructions regarding supplemental information to be included as an attachment ☐

**19** If the total number of participants is 1,000 or more, complete lines (a) through (c)

**a** Enter the percentage of plan assets held as:
Stock: 48% Investment-Grade Debt: 46% High-Yield Debt: 3% Real Estate: 0% Other: 3%

**b** Provide the average duration of the combined investment-grade and high-yield debt:
☐ 0-3 years ☐ 3-6 years ☐ 6-9 years ☒ 9-12 years ☐ 12-15 years ☐ 15-18 years ☐ 18-21 years ☐ 21 years or more

**c** What duration measure was used to calculate line 19(b)?
☐ Effective duration ☐ Macaulay duration ☒ Modified duration ☐ Other (specify):

# Pension Plan for Discontinued Operations of Robert Bosch

**Financial Statements**
**December 31, 2012 and 2011**

# Pension Plan for Discontinued Operations of Robert Bosch
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Note: Supplemental schedules required by Section 2520.103-10 of the Department of Labor's Rules and Regulations for Reporting and Disclosure under the Employee Retirement Income Security Act of 1974 have not been included herein as they are not applicabl

## Independent Auditor's Report

To the Participants and Administrator of the Pension Plan for Discontinued Operations of Robert Bosch

**Report on the Financial Statements**

We were engaged to audit the accompanying financial statements of the Pension Plan for Discontinued Operations of Robert Bosch (the "Plan"), which comprise the statements of net assets available for benefits as of December 31, 2012 and 2011 and the related statements of changes in net assets available for benefits for the years then ended, and the related notes to the financial statements.

***Management's Responsibility for the Financial Statements***

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

***Auditor's Responsibility***

Our responsibility is to express an opinion on the financial statements based on conducting the audit in accordance with auditing standards generally accepted in the United States of America. Because of the matter described in the *Basis for Disclaimer of Opinion* paragraph, however, we were not able to obtain sufficient appropriate audit evidence to provide a basis for an audit opinion.

***Basis for Disclaimer of Opinion***

As permitted by 29 CFR 2520.103-8 of the Department of Labor's Rules and Regulations for Reporting and Disclosure under the Employee Retirement Income Security Act of 1974, the plan administrator instructed us not to perform, and we did not perform, any auditing procedures with respect to the information summarized in Note 4, which was certified by The Northern Trust Company, the trustee of the Plan, except for comparing such information with the related information included in the financial statements. We have been informed by the plan administrator that the trustee holds the Plan's investment assets and executes investment transactions. The plan administrator has obtained certifications from the trustee as of and for the years ended December 31 2012 and 2011, that the information provided to the plan administrator by the trustee is complete and accurate.

***Disclaimer of Opinion***

Because of the significance of the matter described in the *Basis for Disclaimer of Opinion* paragraph, we have not been able to obtain sufficient appropriate audit evidence to provide a basis for an audit opinion. Accordingly, we do not express an opinion on the financial statements.

**Report on Form and Content in Compliance with DOL Rules and Regulations**

The form and content of the information included in the financial statements, other than that derived from the information certified by the trustee, have been audited by us in accordance with auditing standards generally accepted in the United States of America and, in our opinion, are presented in compliance with the Department of Labor's Rules and Regulations for Reporting and Disclosure under the Employee Retirement Income Security Act of 1974.

PricewaterhouseCoopers LLP

October 11, 2013

# Pension Plan for Discontinued Operations of Robert Bosch
## Statements of Net Assets Available for Benefits
## December 31, 2012 and 2011

| | 2012 | 2011 |
|---|---|---|
| **Assets** | | |
| Plan interest in Robert Bosch LLC Master Retirement Trust, at fair value | $ 69,012,715 | $ 65,731,514 |
| Employer contributions receivable | 713,000 | 699,000 |
| | 69,725,715 | 66,430,514 |
| **Liabilities** | | |
| Accrued expenses | 124,283 | 84,446 |
| Net assets available for benefits | $ 69,601,432 | $ 66,346,068 |

The accompanying notes are an integral part of these financial statements.

# Pension Plan for Discontinued Operations of Robert Bosch
## Statements of Changes in Net Assets Available for Benefits
## Years Ended December 31, 2012 and 2011

| | 2012 | 2011 |
|---|---|---|
| **Additions** | | |
| Plan interest in net investment income of Robert Bosch LLC Master Retirement Trust | $ 7,720,963 | $ 865,117 |
| Employer contributions | 2,693,801 | 2,827,000 |
| Total additions | 10,414,764 | 3,692,117 |
| **Deductions** | | |
| Benefit payments | 6,423,980 | 6,093,501 |
| Administrative expenses | 735,420 | 624,116 |
| Total deductions | 7,159,400 | 6,717,617 |
| Net increase (decrease) | 3,255,364 | (3,025,500) |
| **Net assets available for benefits** | | |
| Beginning of year | 66,346,068 | 69,371,568 |
| End of year | $ 69,601,432 | $ 66,346,068 |

The accompanying notes are an integral part of these financial statements.

### 1. Description of the Plan

The following brief description of the Pension Plan for Discontinued Operations of Robert Bosch (the "Plan") is provided for general information purposes only. Participants should refer to the Plan document for a more complete description.

The assets of the Plan are invested in the Robert Bosch LLC Master Retirement Trust ("Master Trust").

**General**
The Plan, established May 1, 1988, is a noncontributory, defined-benefit pension plan covering former hourly employees of Robert Bosch Fluid Power who are members of Lodge No. 437, International Association of Machinists and Aerospace Workers, A.F.L.-C.I.O. (the "Union"). The Plan is subject to the provisions of the Employee Retirement Income Security Act of 1974 ("ERISA").

Effective July 2, 2002, the Racine, Wisconsin, plant was closed. Due to the plant closing, active participants were deemed fully vested and benefits were frozen.

Prior to the plant closure, all hourly employees of Robert Bosch Fluid Power became participants in the Plan provided they were members of the Union.

Since 2007, the following plans sponsored by Robert Bosch LLC (the "Company") were merged into the Plan. The mergers did not impact participants' pension benefits as the benefit provisions of the merged plans have been incorporated into the Plan. All participants have ceased receiving pension accruals as all plans are frozen.

- Forest City Tool Hourly Employees' Pension Plan
- Vermont American Corporation Plan for Vermont Tap and Die Company and Northeast Tool Division
- Mobile Hydraulics Division of the Bosch Rexroth Corporation U.A.W Retirement Income Plan
- Bosch Automotive Motor Systems Retirement Plan
- Greenville, North Carolina Division of Vermont American Corporation Restated Pension Plan
- Gilmour Manufacturing Company Hourly Employees' Pension Plan
- Telex Communications, Inc. Employees' Pension Plan
- Hagglunds Drives, Inc. Salaried Pension Plan

**Contributions**
The Company has agreed to voluntarily contribute such amounts as are necessary to provide assets sufficient to meet the benefits to be paid to Plan participants. The Plan has met the ERISA minimum funding requirements for 2012 and 2011.

**Benefit Payments**
Original benefit provisions of each previous plan have been incorporated into and are defined in the Plan document. A participant is generally eligible for normal retirement benefits on or after the attainment of the defined retirement age and completion of 5 years of vesting service. For normal retirement, pension is payable for the life of the participant in the form of an annuity based on a combination of years of service, eligible compensation or a specified multiplier based on severance date, as applicable. Benefits under the former Telex Communications, Inc. Employees' Pension Plan were calculated based on a cash balance formula.

Certain former plans provide for retirement benefits prior to the defined normal retirement age, which may be reduced unless defined service periods have been reached.

Optional forms of payment are available if elected by the participant as described in the Plan document. A participant that is married throughout the one-year period ending on their annuity starting date shall receive a qualified joint and survivor annuity unless spousal consent is received for an alternate benefit payment.

Certain participants are eligible for disability benefits on or after the completion of a specified vesting period and after being totally and permanently disabled, as defined in the Plan document. Certain participants' beneficiaries are entitled to death benefits, as defined in the Plan document.

**Plan Termination**
Although it has not expressed any intent to do so, the Company has the right to terminate the Plan subject to the provisions of ERISA and as described in the Plan document. Should the Plan terminate at some future time, its net assets will generally not be available on a pro rata basis to provide participants' benefits. Whether a particular participant's accumulated plan benefits will be paid depends on the priority of those benefits, the financial condition of the Company, and the level of benefits guaranteed by the Pension Benefit Guaranty Corporation ("PBGC") at that time. Some benefits may be fully or partially provided for by the then-existing assets and the PBGC guarantee, while other benefits may not be provided for at all.

**Administrative Expenses**
All administrative expenses are paid by the Plan to the extent they are not paid by the Company.

## 2. Significant Accounting Policies

**Basis of Accounting**
The financial statements of the Plan have been prepared on the accrual basis of accounting and in conformity with accounting principles generally accepted in the United States of America ("GAAP").

**Benefit Payments**
Benefits are recorded when paid.

**Investment Valuation and Income Recognition**
The Master Trust's investments are stated at fair value. The fair value of the participation units in the common collective trusts is based on the net asset value of units held on the last business day of the Plan year. Securities such as common stock, preferred stock, registered investment companies and real estate investment trusts, traded on a national securities exchange are valued at the last reported sales price on the last business day of the Plan year; investments traded in the over-the-counter market and listed securities for which no sale was reported on that date are valued at the average of the last reported bid and ask prices. Fixed income securities such as corporate debt instruments and U.S. government securities are valued based on yields currently available on comparable securities of issuers with similar credit ratings. When quoted prices are not available, the bond is valued using matrix pricing or models from reputable pricing vendors. Partnerships/JV interest funds are valued based on the Master Trust's interest in the net asset value of the funds' underlying assets using statements provided by the fund manager.

Investment transactions of the Master Trust are recorded on the trade-date basis. Interest income is recorded on the accrual basis. Dividends are recorded on the ex-dividend date.

**Actuarial Present Value of Accumulated Plan Benefits**
Accumulated plan benefits (Note 3) are those estimated future periodic payments, including lump-sum distributions, that are attributable under the Plan's provisions to services rendered by the employees to the date the benefits were frozen. Accumulated plan benefits include benefits expected to be paid to: (a) retired or terminated employees or their beneficiaries; and (b) present employees or their beneficiaries. Benefits payable under all circumstances – retirement, death, disability, and termination of employment – are included to the extent they are deemed attributable to employee service rendered to the date the benefits were frozen.

**Use of Estimates**
The preparation of the financial statements in conformity with accounting principles generally accepted in the United States of America requires the plan administrator to make estimates and assumptions that affect the reported amounts of assets, liabilities and changes therein, disclosure of contingent assets and liabilities, and the actuarial present value of accumulated plan benefits at the date of the financial statements. Actual results could differ from those estimates.

**Accounting Pronouncement**
In May 2011, the FASB issued authoritative guidance to improve the comparability of fair value measurements presented and disclosed in financial statements prepared in accordance with accounting principles generally accepted in the United States of America and International Financial Reporting Standards by changing the wording used to describe many of the requirements for measuring fair value and disclosing information about fair value measurements. The amendments include those that clarify the FASB's intent about the application of existing fair value measurement and disclosure requirements and those that change a particular principle or requirement for measuring fair value or for disclosing information about fair value measurements. This Accounting Standards Update, which is to be applied prospectively, is effective for annual periods beginning after December 15, 2011. The adoption of the standard did not impact the Plan's financial statements.

## 3. Accumulated Plan Benefits

An independent actuary estimates the actuarial present value of accumulated plan benefits, which is the amount that results from applying actuarial assumptions to adjust the accumulated plan benefits earned by the participants to reflect the time value of money (through discounts for

interest) and the probability of payment (by means of decrements such as for death, disability, withdrawal, or retirement) between the valuation date and the expected date of payment.

The actuarial present value of accumulated plan benefits as of January 1, 2012 was as follows:

| | |
|---|---|
| **Vested benefits** | |
| Participants currently receiving payments | $ 45,684,849 |
| Other participants | 22,428,993 |
| Total vested benefits | 68,113,842 |
| **Nonvested benefits** | 43,208 |
| Total actuarial present value of accumulated plan benefits | $ 68,157,050 |

The following summarizes the significant components of the change in the present value of accumulated plan benefits from January 1, 2011 to 2012:

| | |
|---|---|
| **Actuarial present value of accumulated plan benefits as of January 1, 2011** | $ 62,770,423 |
| Increase (decrease) during the year attributable to | |
| Actuarial experience (gain) loss | (1,487,118) |
| Interest due to change in discount period | 4,632,969 |
| Benefits paid | (6,093,501) |
| Assumption changes | 8,334,277 |
| **Actuarial present value of accumulated plan benefits as of January 1, 2012** | $ 68,157,050 |

Significant assumptions underlying the actuarial computations are as follows:

| | |
|---|---|
| Interest rate | 6.35% and 7.75% as of January 1, 2012 and 2011, respectively |
| Retirement rate | 100% by age 65 |
| Mortality | RP-2000 Combined Table, projected to 2015 with no collar adjustment |

In addition to the interest rate assumption change above, the cash balance interest on accumulated pension credits assumption was lowered from 4.95% to 4.05%. This assumption is used to project account balances from the valuation date to decrement age in order to estimate the monthly benefit assumed to commence at that age.

These actuarial assumptions are based on the presumption that the Plan will continue. Were the Plan to terminate, different actuarial assumptions and other factors might be applicable in determining the actuarial present value of accumulated plan benefits.

**4. Certification of Investment Information**

All investment information disclosed in the accompanying financial statements, including plan interest in Robert Bosch LLC Master Retirement Trust at December 31, 2012 and 2011, plan interest in net investment income of Robert Bosch LLC Master Retirement Trust for the years then ended, and the investments and investment income information of the Master Trust presented in

Note 5, was obtained or derived from information supplied to the plan administrator and certified as complete and accurate by The Northern Trust Company ("Trustee"), except as noted below.

The Master Trust's investment in Partnership/JV interest as of December 31, 2012 of $41,324,293 and the Plan's proportionate share of that investment of $1,900,917 were not certified. Accordingly, the net appreciation in the fair value of the Master Trust's investment in Partnership/JV interest for the year ended December 31, 2012 of $1,324,293 and the Plan's proportionate share of that net appreciation of $60,917 were not certified.

## 5. Investment in Master Trust

The Plan's investments are in the Master Trust, which was established for the investment of assets of the Plan, and several other Company-sponsored retirement plans. Each participating retirement plan has an undivided interest in the Master Trust. At December 31, 2012 and 2011, the Plan's interest in the net assets of the Master Trust was approximately 4.6% and 4.9%, respectively. Investment income and expenses are allocated monthly to the Plan based upon its pro rata share in the net assets of the Master Trust.

The following table presents the fair value of investments for the Master Trust at December 31:

| | 2012 | 2011 |
|---|---|---|
| **Investments, at fair value** | | |
| Common collective trusts | $ 894,197,659 | $ 867,803,179 |
| Common stock | 434,189,070 | 400,755,170 |
| Registered investment companies | 41,383,043 | - |
| Partnership/JV Interest | 41,324,293 | - |
| Preferred stock | 1,230,409 | 869,244 |
| Corporate debt instruments - Other | 14,199,322 | 14,588,833 |
| Corporate debt instruments - Preferred | 43,325,940 | 20,057,357 |
| U.S. government securities | 21,856,503 | 30,726,364 |
| Real estate investment trust | 6,854,274 | 6,818,814 |
| Interest bearing cash and certificates of deposit | 5,247,604 | 6,110,691 |
| Other | 199,740 | 1,176,898 |
| Total investments | 1,504,007,857 | 1,348,906,550 |
| Accrued interest and dividend income | 1,359,680 | 1,442,833 |
| Net pending trades | (1,004,528) | (1,170,363) |
| Net assets | $ 1,504,363,009 | $ 1,349,179,020 |

The fair value of individual investments that represent 5% or more of the Master Trust's net assets is as follows at December 31.

| | 2012 | 2011 |
|---|---|---|
| Collective Short Term Investment Fund | * | $ 92,627,114 |
| MFB NT Collective Long Term Credit Bond Index Fund – NL | $ 320,336,630 | 293,791,215 |
| MFB NT Collective Russell 1000 Growth Index Fund – NL | 187,286,113 | 162,491,312 |
| MFB NTGI-QM Collective Daily 1-5 YR CR BD Index Fund – NL | 139,555,636 | 132,845,475 |
| Northern Trust Collective Short Term Gov't Bond Index Fund – NL | 133,432,877 | 132,760,353 |

* Below 5% threshold

Investment income for the Master Trust was as follows:

| | 2012 | 2011 |
|---|---|---|
| Interest and dividend income | $ 12,586,265 | $ 10,961,059 |
| Net appreciation in fair value of investments | 151,358,873 | 7,971,742 |
| | $ 163,945,138 | $ 18,932,801 |

During 2012 and 2011, the Master Trust's investments (including investments bought and sold, as well as held during the year) appreciated (depreciated) in fair value as follows:

| | 2012 | 2011 |
|---|---|---|
| Common collective trusts | $ 80,440,515 | $ 50,868,023 |
| Common stock | 69,175,541 | (40,222,608) |
| Registered investment companies | 889,702 | 180,372 |
| Patrnership/JV Interest | 1,324,293 | - |
| Preferred stock | 584,355 | (145,730) |
| Corporate debt instruments - Other | (704,321) | (724,999) |
| Corporate debt instruments - Preferred | (363,600) | (933,474) |
| U.S. government securities | (96,144) | (63,609) |
| Real estate investment trust | 524,330 | (1,100,258) |
| Other | (415,798) | 114,025 |
| | $ 151,358,873 | $ 7,971,742 |

## 6. Fair Value Measurements

The FASB established a framework to increase consistency and comparability in fair value measurements. That framework provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (Level 1 measurements) and the lowest priority to unobservable inputs (Level 3 measurements). The three levels of the fair value hierarchy are described as follows:

Level 1 Inputs to the valuation methodology are unadjusted quoted prices for identical assets or liabilities in active markets that the Master Trust has the ability to access.

Level 2 Inputs to the valuation methodology include:

- Quoted prices for similar assets or liabilities in active markets;
- Quoted prices for identical or similar assets or liabilities in inactive markets;
- Inputs other than quoted prices that are observable for the asset or liability;
- Inputs that are derived principally from or corroborated by observable market data by correlation or other means.

If the asset or liability has a specified (contractual) term, the Level 2 input must be observable for substantially the full term of the asset or liability.

Level 3 Inputs to the valuation methodology are unobservable and significant to the fair value measurement.

The asset's or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques used need to maximize the use of observable inputs and minimize the use of unobservable inputs.

For a description of the valuation methodologies used for assets measured at fair value see Investment Valuation and Income Recognition under Note 2. These methods may produce a fair value calculation that may not be indicative of net realizable value or reflective of future fair values. Furthermore, although the Master Trust believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different fair value measurement at the reporting date.

For the years ended December 31, 2012 and 2011, there were no significant transfers in or out of levels 1, 2 or 3.

The following tables set forth by level, within the fair value hierarchy the Master Trust's investment assets at fair value as of December 31, 2012 and 2011:

| | Investment Assets at Fair Value as of December 31, 2012 | | | |
|---|---|---|---|---|
| | **Level 1** | **Level 2** | **Level 3** | **Total** |
| Common collective trusts | | | | |
| Domestic equity fund | $ - | $ 187,286,113 | $ - | $ 187,286,113 |
| Domestic fixed income fund | - | 593,325,142 | - | 593,325,142 |
| International equity fund | - | 85,005,325 | - | 85,005,325 |
| Short–term investment fund | - | 28,581,079 | - | 28,581,079 |
| Total common collective trusts | - | 894,197,659 | - | 894,197,659 |
| Common stock | | | | |
| Domestic common stock | 352,488,581 | - | - | 352,488,581 |
| International common stock | 81,700,489 | - | - | 81,700,489 |
| Total common stock | 434,189,070 | - | - | 434,189,070 |
| Corporate debt instruments | | | | |
| Corporate debt instruments - preferred | - | 43,325,940 | - | 43,325,940 |
| Corporate debt instruments - other | - | 14,199,322 | - | 14,199,322 |
| Total corporate debt instruments | - | 57,525,262 | - | 57,525,262 |
| Preferred stock | 1,230,409 | - | - | 1,230,409 |
| Registered Investment Companies | 41,383,043 | - | - | 41,383,043 |
| Partnership/JV Interest | - | 41,324,293 | - | 41,324,293 |
| U.S. government securities | - | 21,856,503 | - | 21,856,503 |
| Real estate investment trusts | 6,854,274 | - | - | 6,854,274 |
| Interest bearing cash | 5,247,604 | - | - | 5,247,604 |
| Other | 199,740 | - | - | 199,740 |
| Total Master Trust investments at fair value | $ 489,104,140 | $ 1,014,903,717 | $ - | $ 1,504,007,857 |

| | Investment Assets at Fair Value as of December 31, 2011 | | | |
|---|---|---|---|---|
| | **Level 1** | **Level 2** | **Level 3** | **Total** |
| Common collective trusts | | | | |
| Domestic equity fund | $ - | $ 162,491,312 | $ - | $ 162,491,312 |
| Domestic fixed income fund | - | 559,397,044 | - | 559,397,044 |
| International equity fund | - | 53,287,709 | - | 53,287,709 |
| Short–term investment fund | - | 92,627,114 | - | 92,627,114 |
| Total common collective trusts | - | 867,803,179 | - | 867,803,179 |
| Common stock | | | | |
| Domestic common stock | 293,787,385 | - | - | 293,787,385 |
| International common stock | 106,967,785 | - | - | 106,967,785 |
| Total common stock | 400,755,170 | - | - | 400,755,170 |
| Preferred stock | 869,244 | - | - | 869,244 |
| Corporate debt instruments | | | | |
| Corporate debt instruments - preferred | - | 20,057,357 | - | 20,057,357 |
| Corporate debt instruments - other | - | 14,588,833 | - | 14,588,833 |
| Total corporate debt instruments | - | 34,646,190 | - | 34,646,190 |
| U.S. government securities | - | 30,726,364 | - | 30,726,364 |
| Real estate investment trusts | 6,818,814 | - | - | 6,818,814 |
| Interest bearing cash | 4,810,522 | - | - | 4,810,522 |
| Certificates of deposit | - | 1,300,169 | - | 1,300,169 |
| Other | 1,176,898 | - | - | 1,176,898 |
| Total Master Trust investments at fair value | $ 414,430,648 | $ 934,475,902 | $ - | $ 1,348,906,550 |

Common collective trusts and the Partnership/JV interest consist of pools of investments used by institutional investors to obtain equity and fixed income market exposures by investing in funds which are intended to mirror market indices. They are valued on the basis of the relative interest of each participating investor in the fair value of the underlying assets of each of the respective common collective trusts and Partnership/JV. The funds are valued based on the NAV as provided by the investment account manager and are classified in Level 2 of the fair value hierarchy. Common collective trust investments can be traded daily with a time delay for international trades, while the Partnership/JV interest can be redeemed after a 30 day notice period. As of December 31, 2012 and 2011, the Master Trust is not holding any unfunded commitments. Common collective trusts and the partnership/JV interest included in the Master Trust and their relative benchmarks include:

| **Fund** | **Description** | **Benchmark** | **Redemption** |
|---|---|---|---|
| Collective Short Term Investments Fund | Short term cash investments | 90 day U.S. treasury bill | Daily with time delay for international |
| Lazard Emerging Markets Fund | Emerging markets investments | MSCI Emerging Markets Gross | Daily with time delay for international |
| Northern Trust Russell 1000 Growth Index Fund | Russell 1000 growth investments | Dividend Russell 1000 | Daily with time delay for international |
| Northern Trust Short Term Government Bond-NL | Short Term Government Bonds | Barclays US Aggregate Government Short Term | Daily with time delay for international |
| Northern Trust Long Term Credit Bond | Long Term Corporate Bonds | Barclays US Aggregate Credit Long Term | Daily with time delay for international |
| Northern Trust Short Term Credit Bond-NL | Short Term Credit Bond | Barclays US Aggregate Government Short Term | Daily with time delay for international |
| NTGI EAFE - NL | International Equity Investments | MSCI EAFE GD | Daily with time delay for international |
| Developed International Small Cap | International Small Cp | MSCI World Ex & US Small Cap (NQ) | Daily with time delay for international |
| MacKay Shields High Yield Active Core Fund | High Yield | BoA Merrill Lynch High Yield Master II | Monthly |

## 7. Risks and Uncertainties

The Master Trust invests in various investment securities. Investment securities are exposed to various risks such as interest rate, market, and credit risks. Due to the level of risk associated with certain investment securities, it is at least reasonably possible that changes in the values of investment securities will occur in the near term and that such changes could materially affect the amounts reported in the statement of net assets available for benefits.

Plan contributions are made and the actuarial present value of accumulated plan benefits is reported based on certain assumptions pertaining to interest rates, inflation rates and employee demographics, all of which are subject to change. Due to uncertainties inherent in the estimations and assumptions process, it is at least reasonably possible that changes in these estimates and assumptions in the near term would be material to the financial statements.

## 8. Tax Status

The Internal Revenue Service ("IRS") has determined and informed the Company in a letter dated July 11, 2008, that the Plan and related trust are designed in accordance with applicable sections of the Internal Revenue Code (the “Code”). The Plan document was amended and restated on January 1, 2012 and the Company applied for an updated determination from the IRS on January 20, 2012. The plan administrator and the Plan’s ERISA counsel believe that the Plan is designed and is currently being operated in compliance with the applicable requirements of the Code and therefore believe that the Plan is qualified and the related trust is tax-exempt.

Accounting principles generally accepted in the United States of America require plan management to evaluate tax positions taken by the Plan and recognize a tax asset or liability if the Plan has taken an uncertain position that more likely than not would not be sustained upon examination by the IRS. The plan administrator has analyzed the tax positions taken by the Plan, and has concluded that as of December 31, 2012 and 2011, there are no uncertain positions taken or expected to be taken that would require recognition of an asset or liability or disclosure in the financial statements. The Plan is subject to routine audits by taxing jurisdictions; however, there are currently no audits for any tax periods in progress. The plan administrator believes the Plan is no longer subject to income tax examinations for years beginning prior to January 1, 2009.

## 9. Party-in-Interest Transactions

The Master Trust invests in common collective trusts managed by the Trustee or its affiliates. These transactions qualify as exempt party-in-interest transactions. Fees paid to the Trustee by the Master Trust for 2012 and 2011 were $742,194 and $845,692, respectively.

## 10. Subsequent Events

The Plan has evaluated the events and transactions that have occurred through October 11, 2013 the date the financial statements were available to be issued, and noted no items requiring adjustment to the financial statements or additional disclosures.

# SCHEDULE SB (Form 5500)

Department of the Treasury
Internal Revenue Service

Department of Labor
Employee Benefits Security Administration

Pension Benefit Guaranty Corporation

## Single-Employer Defined Benefit Plan Actuarial Information

This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA) and section 6059 of the Internal Revenue Code (the Code).

▶ **File as an attachment to Form 5500 or 5500-SF.**

OMB No. 1210-0110

**2012**

**This Form is Open to Public Inspection**

For calendar plan year 2012 or fiscal plan year beginning 01/01/2012 and ending 12/31/2012

▶ **Round off amounts to nearest dollar.**

▶ **Caution:** A penalty of $1,000 will be assessed for late filing of this report unless reasonable cause is established.

**A** Name of plan

Pension Plan for Discontinued Operations of Robert Bosch

**B** Three-digit plan number (PN) ▶ 010

**C** Plan sponsor's name as shown on line 2a of Form 5500 or 5500-SF

Robert Bosch LLC

**D** Employer Identification Number (EIN)

36-2903176

**E** Type of plan: [X] Single [ ] Multiple-A [ ] Multiple-B

**F** Prior year plan size: [ ] 100 or fewer [ ] 101-500 [X] More than 500

## Part I Basic Information

**1** Enter the valuation date: Month 1 Day 1 Year 2012

**2** Assets:

| | | |
|---|---|---|
| **a** Market value | 2a | 66,413,360 |
| **b** Actuarial value | 2b | 67,569,512 |

**3** Funding target/participant count breakdown:

| | | (1) Number of participants | (2) Funding Target |
|---|---|---|---|
| **a** For retired participants and beneficiaries receiving payment | 3a | 1,729 | 44,582,597 |
| **b** For terminated vested participants | 3b | 1,193 | 15,236,295 |
| **c** For active participants: | | | |
| (1) Non-vested benefits | 3c(1) | | 38,395 |
| (2) Vested benefits | 3c(2) | | 4,616,867 |
| (3) Total active | 3c(3) | 277 | 4,655,262 |
| **d** Total | 3d | 3,199 | 64,474,154 |

**4** If the plan is in at-risk status, check the box and complete lines (a) and (b) [ ]

| | | |
|---|---|---|
| **a** Funding target disregarding prescribed at-risk assumptions | 4a | |
| **b** Funding target reflecting at-risk assumptions, but disregarding transition rule for plans that have been in at-risk status for fewer than five consecutive years and disregarding loading factor | 4b | |
| **5** Effective interest rate | 5 | 6.94 % |
| **6** Target normal cost | 6 | 519,269 |

**Statement by Enrolled Actuary**

To the best of my knowledge, the information supplied in this schedule and accompanying schedules, statements and attachments, if any, is complete and accurate. Each prescribed assumption was applied in accordance with applicable law and regulations. In my opinion, each other assumption is reasonable (taking into account the experience of the plan and reasonable expectations) and such other assumptions, in combination, offer my best estimate of anticipated experience under the plan.

**SIGN HERE**

Karen A. Hirschhorn EA

Signature of actuary

09/04/2013

Date

Karen A. Hirschhorn

Type or print name of actuary

11-04099

Most recent enrollment number

Hewitt Associates LLC

Firm name

(847) 295-5000

Telephone number (including area code)

4 Overlook Point

Lincolnshire IL 60069-4302

Address of the firm

If the actuary has not fully reflected any regulation or ruling promulgated under the statute in completing this schedule, check the box and see instructions [ ]

## Part II Beginning of Year Carryover Prefunding Balances

| | | (a) Carryover balance | (b) Prefunding balance |
|---|---|---|---|
| 7 | Balance at beginning of prior year after applicable adjustments (line 13 from prior year) | 0 | 0 |
| 8 | Portion elected for use to offset prior year's funding requirement (line 35 from prior year) | 0 | 0 |
| 9 | Amount remaining (line 7 minus line 8) | 0 | 0 |
| 10 | Interest on line 9 using prior year's actual return of 1.08 % | | |
| 11 | Prior year's excess contributions to be added to prefunding balance: | | |
| | a Present value of excess contributions (line 38a from prior year) | | 651,251 |
| | b Interest on (a) using prior year's effective interest rate of 6.19 % except as otherwise provided (see instructions) | | 40,312 |
| | c Total available at beginning of current plan year to add to prefunding balance | | 691,563 |
| | d Portion of (c) to be added to prefunding balance | | 0 |
| 12 | Other reductions in balances due to elections or deemed elections | 0 | 0 |
| 13 | Balance at beginning of current year (line 9 + line 10 + line 11d – line 12) | 0 | 0 |

## Part III Funding Percentages

| | | | |
|---|---|---|---|
| 14 | Funding target attainment percentage | 14 | 104.80 % |
| 15 | Adjusted funding target attainment percentage | 15 | 104.80 % |
| 16 | Prior year's funding percentage for purposes of determining whether carryover/prefunding balances may be used to reduce current year's funding requirement | 16 | 90.01 % |
| 17 | If the current value of the assets of the plan is less than 70 percent of the funding target, enter such percentage | 17 | % |

## Part IV Contributions and Liquidity Shortfalls

18 Contributions made to the plan for the plan year by employer(s) and employees:

| (a) Date (MM-DD-YYYY) | (b) Amount paid by employer(s) | (c) Amount paid by employees | (a) Date (MM-DD-YYYY) | (b) Amount paid by employer(s) | (c) Amount paid by employees |
|---|---|---|---|---|---|
| 04/13/2012 | 517,801 | | | | |
| 05/31/2012 | 1,463,000 | | | | |
| 05/08/2013 | 713,000 | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | Totals ▶ 18(b) | 2,693,801 | 18(c) 0 |

| | | | |
|---|---|---|---|
| 19 | Discounted employer contributions – see instructions for small plan with a valuation date after the beginning of the year: | | |
| | a Contributions allocated toward unpaid minimum required contributions from prior years. | 19a | 0 |
| | b Contributions made to avoid restrictions adjusted to valuation date | 19b | 0 |
| | c Contributions allocated toward minimum required contribution for current year adjusted to valuation date | 19c | 2,582,556 |

20 Quarterly contributions and liquidity shortfalls:

a Did the plan have a "funding shortfall" for the prior year? ☒ Yes ☐ No

b If line 20a is "Yes," were required quarterly installments for the current year made in a timely manner? ☒ Yes ☐ No

c If line 20a is "Yes," see instructions and complete the following table as applicable:

Liquidity shortfall as of end of quarter of this plan year

| (1) 1st | (2) 2nd | (3) 3rd | (4) 4th |
|---|---|---|---|
| 0 | 0 | 0 | 0 |

## Part V Assumptions Used to Determine Funding Target and Target Normal Cost

**21** Discount rate:

**a** Segment rates:

| 1st segment: | 2nd segment: | 3rd segment: | |
|---|---|---|---|
| 5.54 % | 6.85 % | 7.52 % | ☐ N/A, full yield curve used |

| | | |
|---|---|---|
| **b** Applicable month (enter code) | **21b** | 4 |
| **22** Weighted average retirement age | **22** | 63 |

**23** Mortality table(s) (see instructions) ☐ Prescribed - combined ☒ Prescribed - separate ☐ Substitute

## Part VI Miscellaneous Items

| | | |
|---|---|---|
| **24** Has a change been made in the non-prescribed actuarial assumptions for the current plan year? If "Yes," see instructions regarding required attachment | ☒ Yes | ☐ No |
| **25** Has a method change been made for the current plan year? If "Yes," see instructions regarding required attachment | ☐ Yes | ☒ No |
| **26** Is the plan required to provide a Schedule of Active Participants? If "Yes," see instructions regarding required attachment | ☒ Yes | ☐ No |

| | | |
|---|---|---|
| **27** If the plan is subject to alternative funding rules, enter applicable code and see instructions regarding attachment | **27** | |

## Part VII Reconciliation of Unpaid Minimum Required Contributions For Prior Years

| | | |
|---|---|---|
| **28** Unpaid minimum required contributions for all prior years | **28** | 0 |
| **29** Discounted employer contributions allocated toward unpaid minimum required contributions from prior years (line 19a) | **29** | 0 |
| **30** Remaining amount of unpaid minimum required contributions (line 28 minus line 29) | **30** | 0 |

## Part VIII Minimum Required Contribution For Current Year

**31** Target normal cost and excess assets (see instructions):

| | | |
|---|---|---|
| **a** Target normal cost (line 6) | **31a** | 519,269 |
| **b** Excess assets, if applicable, but not greater than line 31a | **31b** | 519,269 |

**32** Amortization installments:

| | Outstanding Balance | Installment |
|---|---|---|
| **a** Net shortfall amortization installment | 0 | 0 |
| **b** Waiver amortization installment | 0 | 0 |

| | | |
|---|---|---|
| **33** If a waiver has been approved for this plan year, enter the date of the ruling letter granting the approval (Month _____ Day _____ Year _____) and the waived amount | **33** | 0 |
| **34** Total funding requirement before reflecting carryover/prefunding balances (lines 31a - 31b + 32a + 32b - 33) | **34** | 0 |

| | Carryover balance | Prefunding balance | Total balance |
|---|---|---|---|
| **35** Balances elected for use to offset funding requirement | 0 | 0 | 0 |

| | | |
|---|---|---|
| **36** Additional cash requirement (line 34 minus line 35) | **36** | 0 |
| **37** Contributions allocated toward minimum required contribution for current year adjusted to valuation date (line 19c) | **37** | 2,582,556 |

**38** Present value of excess contributions for current year (see instructions)

| | | |
|---|---|---|
| **a** Total (excess, if any, of line 37 over line 36) | **38a** | 2,582,556 |
| **b** Portion included in line 38a attributable to use of prefunding and funding standard carryover balances | **38b** | 0 |
| **39** Unpaid minimum required contribution for current year (excess, if any, of line 36 over line 37) | **39** | 0 |
| **40** Unpaid minimum required contributions for all years | **40** | 0 |

## Part IX Pension Funding Relief Under Pension Relief Act of 2010 (See Instructions)

**41** If an election was made to use PRA 2010 funding relief for this plan:

**a** Schedule elected ☐ 2 plus 7 years ☐ 15 years

**b** Eligible plan year(s) for which the election in line 41a was made ☐ 2008 ☐ 2009 ☐ 2010 ☐ 2011

| | | |
|---|---|---|
| **42** Amount of acceleration adjustment | **42** | |
| **43** Excess installment acceleration amount to be carried over to future plan years | **43** | |

# Schedule SB Attachment (Form 5500)—2012 Plan Year
# Pension Plan for Discontinued Operations of Robert Bosch
# EIN: 36-2903176 PN: 010

## Schedule SB, line 19—Discounted Employer Contributions

Year applied for contributions: 2012

| Date | Amount | Interest Rate | Days to Discount to 1/1/2012 | Interest Adjusted Contribution |
|---|---|---|---|---|
| April 13, 2012 | $ 517,801 | 6.94% | 103 | $ 508,115 |
| May 31, 2012 | 1,463,000 | 6.94% | 151 | 1,423,056 |
| May 8, 2013 | 713,000 | 6.94% | 493 | 651,385 |
| Total Contribution | $ 2,693,801 | | | $ 2,582,556 |

# Schedule SB Attachment (Form 5500)—2012 Plan Year
# Pension Plan for Discontinued Operations of Robert Bosch
# EIN: 36-2903176 PN: 010

## Schedule SB, line 22—Description of Weighted Average Retirement Age

The average retirement age shown in line 22 has been calculated by assuming the following retirement rates and no decrements other than retirement for this calculation. All retirements are assumed to occur at mid-year, except for the 100% retirement age.

| (a) Age | (b) Rate | (c) Weight | (d) Product (a) × (b) × (c) |
|---|---|---|---|
| 55.5 | 2.00% | 1.0000 | 1.11 |
| 56.5 | 2.00% | 0.9800 | 1.11 |
| 57.5 | 2.00% | 0.9604 | 1.10 |
| 58.5 | 2.00% | 0.9412 | 1.10 |
| 59.5 | 2.00% | 0.9224 | 1.10 |
| 60.5 | 7.00% | 0.9039 | 3.83 |
| 61.5 | 7.00% | 0.8406 | 3.62 |
| 62.5 | 25.00% | 0.7818 | 12.22 |
| 63.5 | 20.00% | 0.5864 | 7.45 |
| 64.5 | 20.00% | 0.4691 | 6.05 |
| 65 | 100.00% | 0.3753 | 24.39 |
| | | Weighted Average | 63.08 |

# Schedule SB Attachment (Form 5500)—2012 Plan Year
# Pension Plan for Discontinued Operations of Robert Bosch
# EIN: 36-2903176 PN: 010

## Schedule SB, Part V—Statement of Actuarial Assumptions/Methods

| | |
|---|---|
| Interest Rates for Minimum Funding Purposes | Based on segment rates with a four-month lookback (as of September 2011), each adjusted as needed to fall within the 25-year average interest rate corridor under MAP-21 |
| 1st Segment Rate | 5.54% |
| 2nd Segment Rate | 6.85% |
| 3rd Segment Rate | 7.52% |
| Interest Rates for Maximum Tax Purposes | Based on segment rates with a four-month lookback (as of September 2011), without regard to the MAP-21 interest rate corridor |
| 1st Segment Rate | 2.06% |
| 2nd Segment Rate | 5.25% |
| 3rd Segment Rate | 6.32% |
| Cash Balance Interest Crediting Rate (Telex) | 4.50% |
| Cash Balance Annuity Conversion Rate (Telex) | Same as funding rates above |
| Cash Balance Mortality Conversion Rate (Telex) | Current 417(e) table |
| Employee Contribution Interest Crediting Rate | |
| VPA Accounts | 3.03% |
| PPA Accounts | 1.40% |
| Retirement Age | |
| Active Participants | See Tables 1-3 |
| Terminated Vested Participants | Age 65 |
| Mortality Rates | |
| Healthy and Disabled | 2012 static mortality table for annuitants and non-annuitants per §1.430(h)(3)-1(e) |
| Withdrawal Rates | See Tables 4-5 |
| Disability Rates | None |
| Decrement Timing | Middle of year decrements, with 100% retirement occurring at beginning of year |

| | |
|---|---|
| Surviving Spouse Benefit | It is assumed that the following have an eligible spouse:<br><br>Males: 85% Telex and UO Henderson, 80% all others<br><br>Females: 75% Telex, 50% UO Henderson, 80% all others<br><br>Males are assumed to be three years older than their spouses. |
| Benefit Limits | Projected benefits are limited by the current IRC section 415 maximum benefit of $200,000. |
| Valuation of Plan Assets | Smoothed fair market value of assets over the current and prior two years, adjusted for contributions, benefit payments, administrative expenses, and expected earnings. The average value of assets calculated in this manner is further limited to not less than 90% nor more than 110% of fair market value.<br><br>A characteristic of this method is that the expected distribution of the value of plan assets is skewed toward understatement relative to the corresponding market values for expected long-term rates of return in excess of the third segment rate under IRC section 430(h)(2)(C)(iii). |
| Expected Return on Assets | |
| 2010 Plan Year | 6.82% |
| 2011 Plan Year | 6.57% |
| Trust Expenses Included in Target Normal Cost | Actual trust expenses limited to 5% of Fair Value of Assets |
| Actuarial Method | Standard unit credit cost method |
| Valuation Date | January 1, 2012 |

Table 1

**Retirement Rates—Hagglunds Grandfathered**

| | Years of Service | |
|---|---|---|
| **Age** | **0-29** | **30+** |
| 60 | 10.00% | 100.00% |
| 61 | 10.00% | 100.00% |
| 62 | 10.00% | 100.00% |
| 63 | 10.00% | 100.00% |
| 64 | 10.00% | 100.00% |
| 65+ | 100.00% | 100.00% |

Table 2

**Retirement Rates—Hagglunds NonGrandfathered**

| | Years of Service | |
|---|---|---|
| **Age** | **0-29** | **30+** |
| 60 | 10.00% | 10.00% |
| 61 | 10.00% | 10.00% |
| 62 | 10.00% | 100.00% |
| 63 | 10.00% | 100.00% |
| 64 | 10.00% | 100.00% |
| 65+ | 100.00% | 100.00% |

Table 3

**Retirement Rates—Telex**

| Age | Rate |
|---|---|
| 55 | 2.00% |
| 56 | 2.00% |
| 57 | 2.00% |
| 58 | 2.00% |
| 59 | 2.00% |
| 60 | 7.00% |
| 61 | 7.00% |
| 62 | 25.00% |
| 63 | 20.00% |
| 64 | 20.00% |
| 65+ | 100.00% |

Table 4

**Withdrawal Rates—Hagglund**

| Age | Rate | Age | Rate |
|---|---|---|---|
| 15 | 0.00% | 35 | 2.42% |
| 16 | 0.00% | 36 | 2.30% |
| 17 | 0.00% | 37 | 2.20% |
| 18 | 5.28% | 38 | 2.08% |
| 19 | 5.08% | 39 | 1.98% |
| 20 | 4.86% | 40 | 1.88% |
| 21 | 4.66% | 41 | 1.80% |
| 22 | 4.46% | 42 | 1.70% |
| 23 | 4.26% | 43 | 1.62% |
| 24 | 4.08% | 44 | 1.54% |
| 25 | 3.90% | 45 | 1.46% |
| 26 | 3.72% | 46 | 1.38% |
| 27 | 3.56% | 47 | 1.32% |
| 28 | 3.40% | 48 | 1.24% |
| 29 | 3.24% | 49 | 1.18% |
| 30 | 3.10% | 50 | 1.12% |
| 31 | 2.94% | 51 | 1.06% |
| 32 | 2.80% | 52 | 1.00% |
| 33 | 2.68% | 53 | 0.94% |
| 34 | 2.54% | 54 | 0.90% |
| | | 55+ | 0.00% |

Table 5

**Withdrawal Rates—Telex**

| Age | Rate | Age | Rate |
|---|---|---|---|
| 15 | 0.00% | 40 | 7.50% |
| 16 | 0.00% | 41 | 7.00% |
| 17 | 0.00% | 42 | 6.50% |
| 18 | 0.00% | 43 | 6.00% |
| 19 | 0.00% | 44 | 5.50% |
| 20 | 25.00% | 45 | 5.00% |
| 21 | 24.00% | 46 | 4.50% |
| 22 | 23.00% | 47 | 4.00% |
| 23 | 22.00% | 48 | 3.50% |
| 24 | 21.00% | 49 | 3.00% |
| 25 | 20.00% | 50 | 2.50% |
| 26 | 19.00% | 51 | 2.00% |
| 27 | 18.00% | 52 | 1.50% |
| 28 | 17.00% | 53 | 1.00% |
| 29 | 16.00% | 54 | 0.50% |
| 30 | 15.00% | 55 | 0.00% |
| 31 | 14.00% | 56 | 0.00% |
| 32 | 13.00% | 57 | 0.00% |
| 33 | 12.00% | 58 | 0.00% |
| 34 | 11.00% | 59 | 0.00% |
| 35 | 10.00% | 60 | 0.00% |
| 36 | 9.50% | 61 | 0.00% |
| 37 | 9.00% | 62 | 0.00% |
| 38 | 8.50% | 63 | 0.00% |
| 39 | 8.00% | 64 | 0.00% |
| | | 65+ | 0.00% |

# Schedule SB Attachment (Form 5500)—2012 Plan Year
# Pension Plan for Discontinued Operations of Robert Bosch
# EIN: 36-2903176 PN: 010

## Schedule SB, Part V—Summary of Plan Provisions

## Forest City

| | |
|---|---|
| Effective Date | July 1, 1980. Amended and restated effective January 1, 1993. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | Hourly employees of the Forest City Tool Company division excluding temporary employees and employees covered by a collective bargaining agreement. Full-time employees become participants on their date of hire. Part-time employees become participants on January 1 or July 1 following one year of eligibility service. |
| Normal Retirement | |
| Eligibility | Age 65. |
| Benefit | A monthly amount equal to $12.00 multiplied by years of credited service. |
| Early Retirement | |
| Eligibility | Age 55 and 10 years of vesting service. |
| Benefit | A monthly benefit equal to the normal retirement benefit reduced by 0.5% for each month the early retirement precedes age 62. |
| Vested Termination | |
| Eligibility | Five years of vesting service. |
| Benefit | The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement based on the same reductions as early retirement from active status. |
| Disability | |
| Eligibility | Ten years of vesting service. |
| Benefit | The accrued benefit based at the date of disability. It is payable without reduction following a 26 week waiting period. |

| | |
|---|---|
| Surviving Spouse | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 100% of the amount payable if the participant had retired early with a 100% joint-and-survivor benefit. |
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | 100% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 100% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | Ten year certain and life annuity and a 50% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Credited Service | Service after July 1, 1980 based on hours. A full year of credited service is earned if the employee works 1,700 or more hours in one plan year. Fractional years are computed by taking the hours of service during the plan year divided by 1,700, rounded to the nearest 1/10 of a year. |
| Vesting Service | One year of vesting service is earned if the employee works 1,000 or more hours in one plan year. |

## Vermont Tap and Die

| | |
|---|---|
| Effective Date | April 15, 1963. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | Hourly employees of the Vermont Tap and Die Company or Northeast Tool Division who are members of the collective bargaining unit represented by the Union. Full-time employees become participants on the first day of the month after they have worked one hour. Part-time employees become participants after completing one year of service. |
| Normal Retirement | |
| Eligibility | Age 65. |
| Benefit | A monthly amount equal to $17.00 multiplied by years of benefit service. For those who terminated prior to April 30, 1991, a lesser multiplier amount applies. |
| Early Retirement | |
| Eligibility | Age 60 and 10 years of vesting service. |
| Benefit | A monthly benefit equal to the normal retirement benefit reduced by 0.5% for each month the early retirement precedes age 65. |
| Vested Termination | |
| Eligibility | Five years of vesting service. |
| Benefit | The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement based on the same reductions as early retirement from active status. |
| Disability | |
| Eligibility | Ten years of vesting service. |
| Benefit | The accrued benefit based at the date of disability. It is payable without reduction following a 26 week waiting period. |
| Surviving Spouse | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 50% of the amount payable if the participant had retired early with a 50% joint-and-survivor benefit. |

| | |
|---|---|
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | 50% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 50% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | A 75% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Benefit Service | Service after April 15, 1963 based on hours. A full year of credited service is earned if the employee works 1,000 or more hours in one plan year. Fractional years are credited in the year of termination, rounded to the nearest 1/12 of a year. |
| Vesting Service | One year of vesting service is earned if the employee works 1,000 or more hours in one plan year. |

## Greenville

| | |
|---|---|
| Effective Date | July 1, 1969. Amended and restated effective March 1, 1994. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | Hourly employees of the Greenville division. Full-time employees become participants on their date of hire. Part-time employees become participants on January 1 or July 1 following one year of eligibility service. |
| Normal Retirement | |
| Eligibility | Age 65. |
| Benefit | A monthly amount equal to the sum of (1), (2) and (3):<br>(1) Credited service prior to March 1, 1989 multiplied by $5.00<br>(2) Credited service from March 1, 1989 to February 28, 1993 multiplied by $8.50<br>(3) Credited service after March 1, 1993 multiplied by $10.00 |
| Early Retirement | |
| Eligibility | Age 55 and 10 years of vesting service. |
| Benefit | A monthly benefit equal to the normal retirement benefit reduced by 0.5% for each month the early retirement precedes age 65. |
| Vested Termination | |
| Eligibility | Five years of vesting service. A partial plan termination resulted due to the plant closing announcement on May 1, 2007. Participants who terminated after the plan closing announcement with less than five years of vesting service were 100% vested in their accrued benefit. |
| Benefit | The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement. The amount of the benefit at early retirement shall be the actuarial equivalent of the normal retirement benefit. |

| | |
|---|---|
| Disability | |
| Eligibility | Age 50 and 15 years of vesting service. |
| Benefit | 110% of the accrued benefit as determined under the early retirement provision. |
| Surviving Spouse | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 100% of the amount payable if the participant had retired early with a 100% joint-and-survivor benefit. |
| Normal Form of Annuity | |
| Without Spouse | Five year certain and life annuity. |
| With Spouse | 100% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 100% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | 50% joint-and-survivor annuity and 66 2/3% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Credited Service | A full year of credited service is earned if the employee works 1,000 or more hours in one plan year. Fractional years are credited in the year of hire and termination, rounded to the nearest 1/12 of a year. A participant shall receive no more than 5/6 of a year of credited service for the short plan year beginning March 1, 1994 and ending December 31, 1994. No service is accrued after March 1, 2008 as a result of the plant closure. |
| Vesting Service | One year of vesting service is earned if the employee works 1,000 or more hours in one plan year. |

## UO Hendersonville

| | |
|---|---|
| Effective Date | January 1, 1995. Amended and restated effective January 1, 2007. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | Any eligible employee who elects to participate must make contributions of 3% of compensation in excess of $25,000. Participation date is January 1 following the date of hire provided employee contributions are made. |
| Normal Retirement | |
| Eligibility | Age 65. |
| Benefit | A monthly amount equal to the greater of (1) or (2):<br>(1) 1.45% of compensation up to the plan covered compensation plus 1.90% of compensation in excess of the plan covered compensation. If a participant has more than 34 years of service, they will receive 1.45% of that year's compensation. Accruals ended on March 23, 2001 due to the plant closure.<br>(2) A minimum amount that is based on the participant's average annual compensation.<br>The Personal Pension Account (PPA) and Voluntary Pension Account (VPA) is credited monthly with interest. The participant can take this account as a refund or convert it to an annuity. |
| Early Retirement | |
| Eligibility | Age 60. |
| Benefit | A monthly benefit equal to the normal retirement benefit.<br>Employees with at least 5 years of pension qualification service shall receive a supplement of $12.00 per month for each year of pension benefit service, payable until age 62. |
| Vested Termination | |
| Eligibility | Five years of pension qualification service. |
| Benefit | The accrued benefit at the date of termination. Payments may begin any time after eligibility for early retirement. The amount of the benefit shall be determined in the same manner as early retirement. |

| | |
|---|---|
| Disability | |
| Eligibility | Fifteen years of pension qualification service. |
| Benefit | 88% of the normal retirement benefit plus certain supplements. |
| Surviving Spouse | |
| Eligibility | Five years of pension qualification service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 50% of the amount payable if the participant had retired early with a 50% joint-and-survivor benefit. |
| Normal Form of Annuity | |
| Without Spouse | Five year certain and life annuity. |
| With Spouse | 50% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 50% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | 75% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Average Annual Compensation | Average of annual compensation for the highest three consecutive years out of the last 10 years. |
| Pension Benefit Service | Service after January 1, 1995. A full year of pension benefit service is earned if the employee works at least the regular number of hours scheduled for him during the year. Fractional years may be credited if the regularly scheduled hours are not met. No service is accrued after March 23, 2001 as a result of the plant closure. |
| Pension Qualification Service | One year of pension qualification service is earned if the employee works 1,000 or more hours in one plan year. |
| Required Contributions | An eligible employee must make contributions of 3% of compensations that is in excess of $25,000 in order to participate in the plan. |
| Voluntary Contributions | An eligible employee may contribute 3% of compensation up to $25,000. |

## Racine

| | |
|---|---|
| Effective Date | May 1, 1988. Amended and restated effective January 1, 2007. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | Must be employed on an hourly rate basis and a member of Lodge No. 437, International Association of Machinists and Aerospace Workers, A.F.L.- C.I.O. |
| Normal Retirement | |
| Eligibility | Age 65 and 5 years of vesting service. |
| Benefit | A monthly amount equal to (1) but no greater than (2): |

(1) Years of credited service up to a maximum of 30 years multiplied by:

| Service Period | Amount |
|---|---|
| Service before August 1, 1994 | $19.78 |
| Service after July 31, 1994 | $28.00 |

(2) 1/30 of an amount equal to 85% of current monthly compensation minus 100% of the primary social security benefit. No monthly retirement benefit shall exceed the current monthly compensation minus the primary social security benefit.

| | |
|---|---|
| Early Retirement | |
| Eligibility | Age 60 and 10 years of vesting service. |
| Benefit | A monthly benefit equal to the normal retirement benefit reduced by 0.5% for each month the early retirement precedes age 62. The benefit is unreduced if the participant has attained age 60 and has 30 years of vesting service. |
| Vested Termination | |
| Eligibility | Five years of vesting service. |
| Benefit | The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement. The benefit is reduced by 0.6% for each month the early retirement precedes age 65. |

| | |
|---|---|
| **Disability** | |
| Eligibility | Ten years of vesting service. |
| Benefit | The accrued benefit based at the date of disability. The benefit is payable when the short or long-term disability benefits cease.<br><br>For those who commenced their benefit prior to age 60, the benefit converts to a normal retirement benefit at age 65. For those who commenced after age 60, it converts to a normal retirement benefit at the earlier of age 70 or after five years of payments. |
| **Surviving Spouse** | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 50% of the amount payable if the participant had retired early with a 50% joint-and-survivor benefit. |
| Minimum Benefit | For participants who have attained age 55 and 10 years of vesting service or age 65 with 5 years of vesting service and death occurred after age 55 and 10 years of vesting service or after 15 years of vesting service, a minimum preretirement benefit is payable as follows:<br><br>The benefit shall be the greater of (1), (2) or (3):<br><br>(1) The surviving spouse benefit described above.<br><br>(2) $65.00<br><br>(3) 40% of the benefit based on credited service and monthly compensation at death, unreduced for early commencement. The benefit is reduced if the spouse is more than five years younger than the participant. |
| **Postretirement Death Benefit** | |
| Eligibility | Five years of vesting service. |
| Benefit | A single sum amount of $4,000 payable to the participant's beneficiary. |

| | |
|---|---|
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | 50% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 50% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | Ten year certain and life annuity, a 75% joint-and-survivor annuity and a 100% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Credited Service | Service after May 1, 1988. It shall include the time period (computed on the basis of full and fractional years) of the participant's employment. |
| Pension Qualification Service | The time period (computed on the basis of full and fractional years) of active employment commencing from date of hire. |

## DCUS Mobile Hourly

| | |
|---|---|
| Effective Date | January 1, 1965. Amended and restated effective January 24, 2004. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | An employee is eligible to participate once they have completed 1,000 hours in any calendar year. |
| Normal Retirement | |
| Eligibility | Age 65 and 5 years of credited service. |
| Benefit | A monthly amount equal to credited service multiplied by the following flat dollar amount: |

| Retirement Date | Amount |
|---|---|
| 2/1/2001 or later | $26.50 |
| 2/1/2000 – 1/31/2001 | $25.50 |
| 12/11/1998 – 1/31/2000 | $24.50 |
| 2/1/1998 – 12/10/1998 | $23.50 |
| 2/1/1997 – 1/31/1998 | $22.50 |
| 10/1/1995 – 1/31/1997 | $21.50 |
| 2/1/1995 – 9/30/1995 | $20.50 |
| 2/1/1994 – 1/31/1995 | $19.50 |
| 2/1/1993 – 1/31/1994 | $19.00 |
| 2/1/1986 – 1/31/1993 | $18.50 |
| 2/1/1985 – 1/31/1986 | $17.50 |
| 2/1/1984 – 1/31/1995 | $16.50 |
| 2/1/1983 – 1/31/1984 | $16.00 |
| 2/1/1982 – 1/31/1983 | $15.00 |
| 2/1/1981 – 1/31/1982 | $14.00 |
| 2/1/1980 – 1/31/1981 | $13.00 |
| 2/1/1979 – 1/31/1980 | $12.50 |
| 2/1/1978 – 1/31/1979 | $12.00 |
| 2/1/1977 – 1/31/1978 | $9.50 |
| 2/1/1976 – 1/31/1977 | $8.75 |
| 2/1/1975 – 1/31/1976 | $8.00 |
| 2/1/1974 – 1/31/1975 | $7.50 |
| 2/1/1973 – 1/31/1974 | $7.00 |
| 7/1/1972 – 1/31/1973 | $6.50 |
| 12/1/1970 – 6/30/1972 | $5.75 |
| 12/1/1968 – 11/30/1970 | $5.25 |
| Prior to 12/1/1968 | $4.25 |

| | |
|---|---|
| **Early Retirement** | |
| Eligibility | Age 60 and 10 years of credited service or age 55 and age plus credited service is greater than 85 (Rule of 85). |
| Benefit | A monthly benefit equal to the normal retirement benefit reduced by 5/9 of 1% for each month the early retirement precedes age 62. The benefit is unreduced if the Rule of 85 is satisfied. In addition, Rule of 85 retirees receive a monthly supplement of $10 multiplied by years of credited service, payable until age 65. |
| **Vested Termination** | |
| Eligibility | Five years of vesting service. |
| Benefit | The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement. The amount of the benefit shall be determined in the same manner as early retirement. |
| **Disability** | |
| Eligibility | Ten years of credited service. |
| Benefit | The accrued benefit based on service to the date of disability.<br><br>In addition, a temporary benefit equal to $9.50 multiplied by years of credited service (maximum of 25 years). The benefit is payable until age 65 or the month the participant becomes eligible for a Primary or Disability benefit under the Federal Social Security Act, if earlier. |
| **Surviving Spouse** | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 60% of the amount payable if the participant had retired early with a 60% joint-and-survivor benefit. |
| **Medicare Supplement** | |
| Eligibility | Age 65 |
| Benefit | A monthly benefit equal to the Medicare Part B premium, which continues to the beneficiary if over 65 or under 65 and enrolled in Medicare Part B. The amount for 2012 is $99.90. |

| | |
|---|---|
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | Effective January 1, 2008, 60% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 60% of reduced benefit continues to surviving spouse. The reduction cannot be greater than the reduction prior to January 1, 2008 which was 5%. |
| Optional Forms of Annuity | 75% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Credited Service | The number of completed years and months from the date of hire to January 1, 1965 plus for each calendar year starting January 1, 1965, one year of credited service is earned when 1,700 hours are worked. Partial years are credited when less than 1,700 hours are worked. Accruals stopped on 2/28/2007 due to the plant closure. |
| Vesting Service | The number of completed years and months from date of hire to January 1, 1976 plus for each calendar year starting January 1, 1976, one year of vesting service is earned when 1,000 hours are worked. |

## Gilmour Manufacturing

**Effective Date**

September 1, 1978. The latest amendment dated December 16, 2010.

**Eligibility for Participation**

Hourly employees of Gilmour Manufacturing Company, excluding both employees covered by a collective bargaining agreement and salaried employees. Full-time employees who work at least 30 hours per week become participants at date of hire. Part-time employees become participants on January 1 or July 1 following one year of service.

**Normal Retirement**

**Eligibility**

Age 65.

**Benefit**

A monthly amount equal to (1) plus (2):

(1) Years of credited service multiplied by:

| Service Period | Amount |
|---|---|
| Service after 12/31/1996 | $13.25 |
| 1/1/1995 – 12/31/1996 | $12.00 |
| 9/1/1994 – 12/31/1994 (250 hours required) | $3.33 |
| 9/1/1992 – 8/31/1994 | $10.00 |
| 9/1/1978 – 8/31/1992 | $8.00 |

(2) $8.00 multiplied by pre 9/1/1978 service multiplied by the years of service to date divided by the years of service at Normal Retirement Date.

**Early Retirement**

**Eligibility**

Age 62 and 10 years of vesting service.

**Benefit**

A monthly benefit equal to the normal retirement benefit reduced by 0.6% for each month the early retirement precedes age 65.

**Vested Termination**

**Eligibility**

Five years of vesting service. A partial plan termination resulted due to the plant closing announcement on March 4, 2009. Participants who terminated after the plan closing announcement with less than five years of vesting service were 100% vested in their accrued benefit.

**Benefit**

The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement. The amount of the benefit shall be determined in the same manner as early retirement.

| | |
|---|---|
| Disability | |
| Eligibility | Ten years of vesting service. |
| Benefit | The accrued benefit based on service to the date of disability, commencing immediately. |
| Surviving Spouse | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning no earlier than the date the participant would have attained age 55 equal to 100% of the amount payable if the participant had retired early with a 100% joint-and-survivor benefit. |
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | 100% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 100% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | Five year certain and life annuity, ten year certain and life annuity, a 50% joint-and-survivor annuity and a 75% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Credited Service | The number of whole years worked as an hourly employee. Accruals stopped on 12/31/2009 due to the plant closure. |
| Vesting Service | The number of years an employee works 1,000 hours or more, excluding years prior to September 1, 1978. |

## Hagglunds Drive

| | |
|---|---|
| Effective Date | January 1, 2000. Amended and restated effective January 1, 2002. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | An employee that was a participant on December 31, 1999 of the MacGregor (USA), Inc. Salaried Pension Plan became a participant on January 1, 2000. No new participants can enter the plan after December 31, 1999. |
| Normal Retirement | |
| Eligibility | Age 65. |
| Benefit | A monthly amount equal to (1) plus (2) but not less than (3) or (4):<br><br>(1) 1.05% of average annual compensation up to covered compensation multiplied by years of credited service limited to 30 years.<br><br>(2) 1.50% of average annual compensation in excess of covered compensation multiplied by years of credited service limited to 30 years.<br><br>(3) The accrued benefit under the prior plan in effect December 31, 1989.<br><br>(4) The accrued benefit under the prior plan in effect December 31, 1995.<br><br>No credited service is earned after December 31, 1999. |
| Early Retirement | |
| Eligibility | Age 55 and 10 years of continuous service. Certain grandfathered participants are eligible to retire when their age plus service is greater than or equal to 75. |
| Benefit | A monthly benefit equal to the normal retirement benefit reduced by 1/3 of 1% for each month the early retirement precedes age 65.<br><br>For participants with more than 30 years of service, the benefit is reduced 1/3 of 1% for each month the early retirement precedes age 62.<br><br>Certain grandfathered participants have the reduction calculated from age 60. |

| | |
|---|---|
| Vested Termination | |
| Eligibility | Five years of vesting service. |
| Benefit | The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement. The amount of the benefit shall be determined in the same manner as early retirement. |
| Surviving Spouse | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 100% of the amount payable if the participant had retired early with a 100% joint-and-survivor benefit. |
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | 100% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 100% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | Lump sum payment if less than $5,000 and a 50% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Credited Service | Each participant shall be credited with the years of credited service with which he was credited under the prior plan as of December 31, 1999. No additional credited service will be grated for periods after December 31, 1999. |
| Vesting Service | The period from date of hire to date of termination. Partial years of service are credited on the basis of completed days. |

## Telex

| | |
|---|---|
| Effective Date | June 1, 1989. Amended and restated effective July 1, 1999. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | An employee is eligible to participate in the plan upon completion of one year of service in which 1,000 or more hours were worked. Participation date is the first of the month following completion of the eligibility requirements. No new participants can enter the plan after June 30, 2003. |
| Normal Retirement | |
| Eligibility | Age 65. |
| Benefit | An account balance that consists of (1) plus (2) plus (3):<br>(1) Initial account balance which shall equal the sum of the actuarial present value of the accrued benefit under the plan in effect on June 30, 1999 plus the accumulated employee contributions as of January 1, 1982 increased with interest at 8% per year through June 30, 1999.<br>(2) Pay credits which shall be credited to the account balance as of December 31 of the current year. As of June 30, 2003, pay credits are no longer granted.<br>(3) Investment credit which is an amount equal to the account balance as of the first day of the current year multiplied by the investment credit rate in effect for the current year.<br>The account balance can be paid as a lump sum or an actuarially equivalent monthly annuity. Prior to distribution the account balance shall never be less than the actuarial present value of the accrued benefit under the plan at June 30, 1999. |
| Vested Termination | |
| Eligibility | Three years of vesting service. |
| Benefit | The accrued benefit at the date of termination. Prior to commencement the accrued benefit at termination will be credited with interest annually. |

| | |
|---|---|
| Surviving Spouse | |
| Eligibility | Three years of vesting service. |
| Benefit | The account balance paid as a lump sum or an actuarially equivalent life annuity. |
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | 100% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 100% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | Lump sum payment, a five year certain and life annuity, a ten year certain and life annuity and a 50% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Vesting Service | A year of vesting service is earned for each calendar year that 1,000 or more hours of service are worked. |

## Plan Changes Since the Prior Year

The funding valuation does not reflect any plan changes.

## Other Information to Fully and Fairly Disclose the Actuarial Position of the Plan

Due to software limitations with the electronic filing process, information filed electronically cannot be controlled by the Enrolled Actuary. The values on the signed Schedule SB will govern to the extent there are any differences in the entries filed electronically and the actual data contained on the signed Schedule SB

As a result of a change in firms providing actuarial services, the Enrolled Actuary has changed from Nicole M. Stopoulos of Towers Watson to Karen A. Hirschhorn of Aon Hewitt.

This change has automatic approval under Announcement 2010-3.

# Schedule SB Attachment (Form 5500)—2012 Plan Year
# Pension Plan for Discontinued Operations of Robert Bosch
# EIN: 36-2903176 PN: 010

## Schedule SB, line 24—Change in Actuarial Assumptions

The funding valuation reflects the following assumption changes:

- A change in the cash balance interest crediting rate from 5.00% to 4.50%.
- A change in the cash balance annuity conversion rate from 6.00% to segment rates as of September 2011.

These changes were made to better reflect the anticipated plan experience. Neither of these assumption change reduced the funding shortfall by more than thresholds stated in Internal Revenue Code Section 430(h)(5); as such, approval of the Commissioner is not required.

# Schedule SB Attachment (Form 5500)—2012 Plan Year
# Pension Plan for Discontinued Operations of Robert Bosch
# EIN: 36-2903176 PN: 010

## Schedule SB, line 26—Schedule of Active Participant Data as of January 1, 2012

Number of Participants and Average Compensation

| Attained Age | Years of Credited Service | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | <1 | 1-4 | 5-9 | 10-14 | 15-19 | 20-24 | 25-29 | 30-34 | 35-39 | 40+ |
| <25 | | | | | | | | | | |
| 25-29 | | | | | | | | | | |
| 30-34 | | | | 4 | | | | | | |
| 35-39 | | | | 22<br>$30,000 | 2 | | | | | |
| 40-44 | | 2 | 1 | 28<br>$30,000 | 10 | 3 | | | | |
| 45-49 | | | 1 | 17 | 13 | 9 | 6 | 1 | | |
| 50-54 | | | 2 | 18 | 4 | 7 | 6 | 4 | 1 | |
| 55-59 | | 1 | 1 | 19 | 6 | 6 | 7 | 12 | 8 | 3 |
| 60-64 | | 1 | 1 | 14 | 2 | 3 | 5 | 7 | 6 | 4 |
| 65-69 | | | | 2 | 1 | 1 | | | 1 | 3 |
| 70+ | | | | | 1 | | | | | 1 |

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# Schedule SB Attachment (Form 5500)—2012 Plan Year
# Pension Plan for Discontinued Operations of Robert Bosch
# EIN: 36-2903176 PN: 010

## Schedule SB, line 19—Discounted Employer Contributions

Year applied for contributions: 2012

| Date | Amount | Interest Rate | Days to Discount to 1/1/2012 | Interest Adjusted Contribution |
|---|---|---|---|---|
| April 13, 2012 | $ 517,801 | 6.94% | 103 | $ 508,115 |
| May 31, 2012 | 1,463,000 | 6.94% | 151 | 1,423,056 |
| May 8, 2013 | 713,000 | 6.94% | 493 | 651,385 |
| Total Contribution | $ 2,693,801 | | | $ 2,582,556 |

# Schedule SB Attachment (Form 5500)—2012 Plan Year
# Pension Plan for Discontinued Operations of Robert Bosch
# EIN: 36-2903176 PN: 010

## Schedule SB, line 22—Description of Weighted Average Retirement Age

The average retirement age shown in line 22 has been calculated by assuming the following retirement rates and no decrements other than retirement for this calculation. All retirements are assumed to occur at mid-year, except for the 100% retirement age.

| (a) Age | (b) Rate | (c) Weight | (d) Product (a) × (b) × (c) |
|---|---|---|---|
| 55.5 | 2.00% | 1.0000 | 1.11 |
| 56.5 | 2.00% | 0.9800 | 1.11 |
| 57.5 | 2.00% | 0.9604 | 1.10 |
| 58.5 | 2.00% | 0.9412 | 1.10 |
| 59.5 | 2.00% | 0.9224 | 1.10 |
| 60.5 | 7.00% | 0.9039 | 3.83 |
| 61.5 | 7.00% | 0.8406 | 3.62 |
| 62.5 | 25.00% | 0.7818 | 12.22 |
| 63.5 | 20.00% | 0.5864 | 7.45 |
| 64.5 | 20.00% | 0.4691 | 6.05 |
| 65 | 100.00% | 0.3753 | 24.39 |
| | | Weighted Average | 63.08 |

# Schedule SB Attachment (Form 5500)—2012 Plan Year
# Pension Plan for Discontinued Operations of Robert Bosch
# EIN: 36-2903176 PN: 010

## Schedule SB, Part V—Statement of Actuarial Assumptions/Methods

| | |
|---|---|
| Interest Rates for Minimum Funding Purposes | Based on segment rates with a four-month lookback (as of September 2011), each adjusted as needed to fall within the 25-year average interest rate corridor under MAP-21 |
| 1st Segment Rate | 5.54% |
| 2nd Segment Rate | 6.85% |
| 3rd Segment Rate | 7.52% |
| Interest Rates for Maximum Tax Purposes | Based on segment rates with a four-month lookback (as of September 2011), without regard to the MAP-21 interest rate corridor |
| 1st Segment Rate | 2.06% |
| 2nd Segment Rate | 5.25% |
| 3rd Segment Rate | 6.32% |
| Cash Balance Interest Crediting Rate (Telex) | 4.50% |
| Cash Balance Annuity Conversion Rate (Telex) | Same as funding rates above |
| Cash Balance Mortality Conversion Rate (Telex) | Current 417(e) table |
| Employee Contribution Interest Crediting Rate | |
| VPA Accounts | 3.03% |
| PPA Accounts | 1.40% |
| Retirement Age | |
| Active Participants | See Tables 1-3 |
| Terminated Vested Participants | Age 65 |
| Mortality Rates | |
| Healthy and Disabled | 2012 static mortality table for annuitants and non-annuitants per §1.430(h)(3)-1(e) |
| Withdrawal Rates | See Tables 4-5 |
| Disability Rates | None |
| Decrement Timing | Middle of year decrements, with 100% retirement occurring at beginning of year |

| | |
|---|---|
| Surviving Spouse Benefit | It is assumed that the following have an eligible spouse:<br><br>Males: 85% Telex and UO Henderson, 80% all others<br><br>Females: 75% Telex, 50% UO Henderson, 80% all others<br><br>Males are assumed to be three years older than their spouses. |
| Benefit Limits | Projected benefits are limited by the current IRC section 415 maximum benefit of $200,000. |
| Valuation of Plan Assets | Smoothed fair market value of assets over the current and prior two years, adjusted for contributions, benefit payments, administrative expenses, and expected earnings. The average value of assets calculated in this manner is further limited to not less than 90% nor more than 110% of fair market value.<br><br>A characteristic of this method is that the expected distribution of the value of plan assets is skewed toward understatement relative to the corresponding market values for expected long-term rates of return in excess of the third segment rate under IRC section 430(h)(2)(C)(iii). |
| Expected Return on Assets | |
| 2010 Plan Year | 6.82% |
| 2011 Plan Year | 6.57% |
| Trust Expenses Included in Target Normal Cost | Actual trust expenses limited to 5% of Fair Value of Assets |
| Actuarial Method | Standard unit credit cost method |
| Valuation Date | January 1, 2012 |

Table 1

**Retirement Rates—Hagglunds Grandfathered**

| | Years of Service | |
|---|---|---|
| **Age** | **0-29** | **30+** |
| 60 | 10.00% | 100.00% |
| 61 | 10.00% | 100.00% |
| 62 | 10.00% | 100.00% |
| 63 | 10.00% | 100.00% |
| 64 | 10.00% | 100.00% |
| 65+ | 100.00% | 100.00% |

Table 2

**Retirement Rates—Hagglunds NonGrandfathered**

| | Years of Service | |
|---|---|---|
| **Age** | **0-29** | **30+** |
| 60 | 10.00% | 10.00% |
| 61 | 10.00% | 10.00% |
| 62 | 10.00% | 100.00% |
| 63 | 10.00% | 100.00% |
| 64 | 10.00% | 100.00% |
| 65+ | 100.00% | 100.00% |

Table 3

**Retirement Rates—Telex**

| Age | Rate |
|---|---|
| 55 | 2.00% |
| 56 | 2.00% |
| 57 | 2.00% |
| 58 | 2.00% |
| 59 | 2.00% |
| 60 | 7.00% |
| 61 | 7.00% |
| 62 | 25.00% |
| 63 | 20.00% |
| 64 | 20.00% |
| 65+ | 100.00% |

Table 4

**Withdrawal Rates—Hagglund**

| Age | Rate | Age | Rate |
|---|---|---|---|
| 15 | 0.00% | 35 | 2.42% |
| 16 | 0.00% | 36 | 2.30% |
| 17 | 0.00% | 37 | 2.20% |
| 18 | 5.28% | 38 | 2.08% |
| 19 | 5.08% | 39 | 1.98% |
| 20 | 4.86% | 40 | 1.88% |
| 21 | 4.66% | 41 | 1.80% |
| 22 | 4.46% | 42 | 1.70% |
| 23 | 4.26% | 43 | 1.62% |
| 24 | 4.08% | 44 | 1.54% |
| 25 | 3.90% | 45 | 1.46% |
| 26 | 3.72% | 46 | 1.38% |
| 27 | 3.56% | 47 | 1.32% |
| 28 | 3.40% | 48 | 1.24% |
| 29 | 3.24% | 49 | 1.18% |
| 30 | 3.10% | 50 | 1.12% |
| 31 | 2.94% | 51 | 1.06% |
| 32 | 2.80% | 52 | 1.00% |
| 33 | 2.68% | 53 | 0.94% |
| 34 | 2.54% | 54 | 0.90% |
| | | 55+ | 0.00% |

Table 5

**Withdrawal Rates—Telex**

| Age | Rate | Age | Rate |
|---|---|---|---|
| 15 | 0.00% | 40 | 7.50% |
| 16 | 0.00% | 41 | 7.00% |
| 17 | 0.00% | 42 | 6.50% |
| 18 | 0.00% | 43 | 6.00% |
| 19 | 0.00% | 44 | 5.50% |
| 20 | 25.00% | 45 | 5.00% |
| 21 | 24.00% | 46 | 4.50% |
| 22 | 23.00% | 47 | 4.00% |
| 23 | 22.00% | 48 | 3.50% |
| 24 | 21.00% | 49 | 3.00% |
| 25 | 20.00% | 50 | 2.50% |
| 26 | 19.00% | 51 | 2.00% |
| 27 | 18.00% | 52 | 1.50% |
| 28 | 17.00% | 53 | 1.00% |
| 29 | 16.00% | 54 | 0.50% |
| 30 | 15.00% | 55 | 0.00% |
| 31 | 14.00% | 56 | 0.00% |
| 32 | 13.00% | 57 | 0.00% |
| 33 | 12.00% | 58 | 0.00% |
| 34 | 11.00% | 59 | 0.00% |
| 35 | 10.00% | 60 | 0.00% |
| 36 | 9.50% | 61 | 0.00% |
| 37 | 9.00% | 62 | 0.00% |
| 38 | 8.50% | 63 | 0.00% |
| 39 | 8.00% | 64 | 0.00% |
| | | 65+ | 0.00% |

# Schedule SB Attachment (Form 5500)—2012 Plan Year
# Pension Plan for Discontinued Operations of Robert Bosch
# EIN: 36-2903176 PN: 010

## Schedule SB, Part V—Summary of Plan Provisions

## Forest City

| | |
|---|---|
| Effective Date | July 1, 1980. Amended and restated effective January 1, 1993. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | Hourly employees of the Forest City Tool Company division excluding temporary employees and employees covered by a collective bargaining agreement. Full-time employees become participants on their date of hire. Part-time employees become participants on January 1 or July 1 following one year of eligibility service. |
| Normal Retirement | |
| Eligibility | Age 65. |
| Benefit | A monthly amount equal to $12.00 multiplied by years of credited service. |
| Early Retirement | |
| Eligibility | Age 55 and 10 years of vesting service. |
| Benefit | A monthly benefit equal to the normal retirement benefit reduced by 0.5% for each month the early retirement precedes age 62. |
| Vested Termination | |
| Eligibility | Five years of vesting service. |
| Benefit | The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement based on the same reductions as early retirement from active status. |
| Disability | |
| Eligibility | Ten years of vesting service. |
| Benefit | The accrued benefit based at the date of disability. It is payable without reduction following a 26 week waiting period. |

| | |
|---|---|
| Surviving Spouse | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 100% of the amount payable if the participant had retired early with a 100% joint-and-survivor benefit. |
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | 100% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 100% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | Ten year certain and life annuity and a 50% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Credited Service | Service after July 1, 1980 based on hours. A full year of credited service is earned if the employee works 1,700 or more hours in one plan year. Fractional years are computed by taking the hours of service during the plan year divided by 1,700, rounded to the nearest 1/10 of a year. |
| Vesting Service | One year of vesting service is earned if the employee works 1,000 or more hours in one plan year. |

## Vermont Tap and Die

| | |
|---|---|
| Effective Date | April 15, 1963. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | Hourly employees of the Vermont Tap and Die Company or Northeast Tool Division who are members of the collective bargaining unit represented by the Union. Full-time employees become participants on the first day of the month after they have worked one hour. Part-time employees become participants after completing one year of service. |
| Normal Retirement | |
| Eligibility | Age 65. |
| Benefit | A monthly amount equal to $17.00 multiplied by years of benefit service. For those who terminated prior to April 30, 1991, a lesser multiplier amount applies. |
| Early Retirement | |
| Eligibility | Age 60 and 10 years of vesting service. |
| Benefit | A monthly benefit equal to the normal retirement benefit reduced by 0.5% for each month the early retirement precedes age 65. |
| Vested Termination | |
| Eligibility | Five years of vesting service. |
| Benefit | The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement based on the same reductions as early retirement from active status. |
| Disability | |
| Eligibility | Ten years of vesting service. |
| Benefit | The accrued benefit based at the date of disability. It is payable without reduction following a 26 week waiting period. |
| Surviving Spouse | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 50% of the amount payable if the participant had retired early with a 50% joint-and-survivor benefit. |

| | |
|---|---|
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | 50% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 50% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | A 75% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Benefit Service | Service after April 15, 1963 based on hours. A full year of credited service is earned if the employee works 1,000 or more hours in one plan year. Fractional years are credited in the year of termination, rounded to the nearest 1/12 of a year. |
| Vesting Service | One year of vesting service is earned if the employee works 1,000 or more hours in one plan year. |

## Greenville

| | |
|---|---|
| Effective Date | July 1, 1969. Amended and restated effective March 1, 1994. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | Hourly employees of the Greenville division. Full-time employees become participants on their date of hire. Part-time employees become participants on January 1 or July 1 following one year of eligibility service. |
| Normal Retirement | |
| Eligibility | Age 65. |
| Benefit | A monthly amount equal to the sum of (1), (2) and (3):<br>(1) Credited service prior to March 1, 1989 multiplied by $5.00<br>(2) Credited service from March 1, 1989 to February 28, 1993 multiplied by $8.50<br>(3) Credited service after March 1, 1993 multiplied by $10.00 |
| Early Retirement | |
| Eligibility | Age 55 and 10 years of vesting service. |
| Benefit | A monthly benefit equal to the normal retirement benefit reduced by 0.5% for each month the early retirement precedes age 65. |
| Vested Termination | |
| Eligibility | Five years of vesting service. A partial plan termination resulted due to the plant closing announcement on May 1, 2007. Participants who terminated after the plan closing announcement with less than five years of vesting service were 100% vested in their accrued benefit. |
| Benefit | The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement. The amount of the benefit at early retirement shall be the actuarial equivalent of the normal retirement benefit. |

| | |
|---|---|
| Disability | |
| Eligibility | Age 50 and 15 years of vesting service. |
| Benefit | 110% of the accrued benefit as determined under the early retirement provision. |
| Surviving Spouse | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 100% of the amount payable if the participant had retired early with a 100% joint-and-survivor benefit. |
| Normal Form of Annuity | |
| Without Spouse | Five year certain and life annuity. |
| With Spouse | 100% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 100% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | 50% joint-and-survivor annuity and 66 2/3% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Credited Service | A full year of credited service is earned if the employee works 1,000 or more hours in one plan year. Fractional years are credited in the year of hire and termination, rounded to the nearest 1/12 of a year. A participant shall receive no more than 5/6 of a year of credited service for the short plan year beginning March 1, 1994 and ending December 31, 1994. No service is accrued after March 1, 2008 as a result of the plant closure. |
| Vesting Service | One year of vesting service is earned if the employee works 1,000 or more hours in one plan year. |

## UO Hendersonville

| | |
|---|---|
| Effective Date | January 1, 1995. Amended and restated effective January 1, 2007. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | Any eligible employee who elects to participate must make contributions of 3% of compensation in excess of $25,000. Participation date is January 1 following the date of hire provided employee contributions are made. |
| Normal Retirement | |
| Eligibility | Age 65. |
| Benefit | A monthly amount equal to the greater of (1) or (2):<br>(1) 1.45% of compensation up to the plan covered compensation plus 1.90% of compensation in excess of the plan covered compensation. If a participant has more than 34 years of service, they will receive 1.45% of that year's compensation. Accruals ended on March 23, 2001 due to the plant closure.<br>(2) A minimum amount that is based on the participant's average annual compensation.<br>The Personal Pension Account (PPA) and Voluntary Pension Account (VPA) is credited monthly with interest. The participant can take this account as a refund or convert it to an annuity. |
| Early Retirement | |
| Eligibility | Age 60. |
| Benefit | A monthly benefit equal to the normal retirement benefit.<br>Employees with at least 5 years of pension qualification service shall receive a supplement of $12.00 per month for each year of pension benefit service, payable until age 62. |
| Vested Termination | |
| Eligibility | Five years of pension qualification service. |
| Benefit | The accrued benefit at the date of termination. Payments may begin any time after eligibility for early retirement. The amount of the benefit shall be determined in the same manner as early retirement. |

| | |
|---|---|
| Disability | |
| Eligibility | Fifteen years of pension qualification service. |
| Benefit | 88% of the normal retirement benefit plus certain supplements. |
| Surviving Spouse | |
| Eligibility | Five years of pension qualification service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 50% of the amount payable if the participant had retired early with a 50% joint-and-survivor benefit. |
| Normal Form of Annuity | |
| Without Spouse | Five year certain and life annuity. |
| With Spouse | 50% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 50% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | 75% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Average Annual Compensation | Average of annual compensation for the highest three consecutive years out of the last 10 years. |
| Pension Benefit Service | Service after January 1, 1995. A full year of pension benefit service is earned if the employee works at least the regular number of hours scheduled for him during the year. Fractional years may be credited if the regularly scheduled hours are not met. No service is accrued after March 23, 2001 as a result of the plant closure. |
| Pension Qualification Service | One year of pension qualification service is earned if the employee works 1,000 or more hours in one plan year. |
| Required Contributions | An eligible employee must make contributions of 3% of compensations that is in excess of $25,000 in order to participate in the plan. |
| Voluntary Contributions | An eligible employee may contribute 3% of compensation up to $25,000. |

## Racine

| | |
|---|---|
| Effective Date | May 1, 1988. Amended and restated effective January 1, 2007. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | Must be employed on an hourly rate basis and a member of Lodge No. 437, International Association of Machinists and Aerospace Workers, A.F.L.- C.I.O. |
| Normal Retirement | |
| Eligibility | Age 65 and 5 years of vesting service. |
| Benefit | A monthly amount equal to (1) but no greater than (2): |

(1) Years of credited service up to a maximum of 30 years multiplied by:

| Service Period | Amount |
|---|---|
| Service before August 1, 1994 | $19.78 |
| Service after July 31, 1994 | $28.00 |

(2) 1/30 of an amount equal to 85% of current monthly compensation minus 100% of the primary social security benefit. No monthly retirement benefit shall exceed the current monthly compensation minus the primary social security benefit.

| | |
|---|---|
| Early Retirement | |
| Eligibility | Age 60 and 10 years of vesting service. |
| Benefit | A monthly benefit equal to the normal retirement benefit reduced by 0.5% for each month the early retirement precedes age 62. The benefit is unreduced if the participant has attained age 60 and has 30 years of vesting service. |
| Vested Termination | |
| Eligibility | Five years of vesting service. |
| Benefit | The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement. The benefit is reduced by 0.6% for each month the early retirement precedes age 65. |

| | |
|---|---|
| **Disability** | |
| Eligibility | Ten years of vesting service. |
| Benefit | The accrued benefit based at the date of disability. The benefit is payable when the short or long-term disability benefits cease.<br><br>For those who commenced their benefit prior to age 60, the benefit converts to a normal retirement benefit at age 65. For those who commenced after age 60, it converts to a normal retirement benefit at the earlier of age 70 or after five years of payments. |
| **Surviving Spouse** | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 50% of the amount payable if the participant had retired early with a 50% joint-and-survivor benefit. |
| Minimum Benefit | For participants who have attained age 55 and 10 years of vesting service or age 65 with 5 years of vesting service and death occurred after age 55 and 10 years of vesting service or after 15 years of vesting service, a minimum preretirement benefit is payable as follows:<br><br>The benefit shall be the greater of (1), (2) or (3):<br><br>(1) The surviving spouse benefit described above.<br><br>(2) $65.00<br><br>(3) 40% of the benefit based on credited service and monthly compensation at death, unreduced for early commencement. The benefit is reduced if the spouse is more than five years younger than the participant. |
| **Postretirement Death Benefit** | |
| Eligibility | Five years of vesting service. |
| Benefit | A single sum amount of $4,000 payable to the participant's beneficiary. |

| | |
|---|---|
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | 50% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 50% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | Ten year certain and life annuity, a 75% joint-and-survivor annuity and a 100% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Credited Service | Service after May 1, 1988. It shall include the time period (computed on the basis of full and fractional years) of the participant's employment. |
| Pension Qualification Service | The time period (computed on the basis of full and fractional years) of active employment commencing from date of hire. |

## DCUS Mobile Hourly

| | |
|---|---|
| Effective Date | January 1, 1965. Amended and restated effective January 24, 2004. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | An employee is eligible to participate once they have completed 1,000 hours in any calendar year. |
| Normal Retirement | |
| Eligibility | Age 65 and 5 years of credited service. |
| Benefit | A monthly amount equal to credited service multiplied by the following flat dollar amount: |

| Retirement Date | Amount |
|---|---|
| 2/1/2001 or later | $26.50 |
| 2/1/2000 – 1/31/2001 | $25.50 |
| 12/11/1998 – 1/31/2000 | $24.50 |
| 2/1/1998 – 12/10/1998 | $23.50 |
| 2/1/1997 – 1/31/1998 | $22.50 |
| 10/1/1995 – 1/31/1997 | $21.50 |
| 2/1/1995 – 9/30/1995 | $20.50 |
| 2/1/1994 – 1/31/1995 | $19.50 |
| 2/1/1993 – 1/31/1994 | $19.00 |
| 2/1/1986 – 1/31/1993 | $18.50 |
| 2/1/1985 – 1/31/1986 | $17.50 |
| 2/1/1984 – 1/31/1995 | $16.50 |
| 2/1/1983 – 1/31/1984 | $16.00 |
| 2/1/1982 – 1/31/1983 | $15.00 |
| 2/1/1981 – 1/31/1982 | $14.00 |
| 2/1/1980 – 1/31/1981 | $13.00 |
| 2/1/1979 – 1/31/1980 | $12.50 |
| 2/1/1978 – 1/31/1979 | $12.00 |
| 2/1/1977 – 1/31/1978 | $9.50 |
| 2/1/1976 – 1/31/1977 | $8.75 |
| 2/1/1975 – 1/31/1976 | $8.00 |
| 2/1/1974 – 1/31/1975 | $7.50 |
| 2/1/1973 – 1/31/1974 | $7.00 |
| 7/1/1972 – 1/31/1973 | $6.50 |
| 12/1/1970 – 6/30/1972 | $5.75 |
| 12/1/1968 – 11/30/1970 | $5.25 |
| Prior to 12/1/1968 | $4.25 |

| | |
|---|---|
| **Early Retirement** | |
| Eligibility | Age 60 and 10 years of credited service or age 55 and age plus credited service is greater than 85 (Rule of 85). |
| Benefit | A monthly benefit equal to the normal retirement benefit reduced by 5/9 of 1% for each month the early retirement precedes age 62. The benefit is unreduced if the Rule of 85 is satisfied. In addition, Rule of 85 retirees receive a monthly supplement of $10 multiplied by years of credited service, payable until age 65. |
| **Vested Termination** | |
| Eligibility | Five years of vesting service. |
| Benefit | The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement. The amount of the benefit shall be determined in the same manner as early retirement. |
| **Disability** | |
| Eligibility | Ten years of credited service. |
| Benefit | The accrued benefit based on service to the date of disability.<br><br>In addition, a temporary benefit equal to $9.50 multiplied by years of credited service (maximum of 25 years). The benefit is payable until age 65 or the month the participant becomes eligible for a Primary or Disability benefit under the Federal Social Security Act, if earlier. |
| **Surviving Spouse** | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 60% of the amount payable if the participant had retired early with a 60% joint-and-survivor benefit. |
| **Medicare Supplement** | |
| Eligibility | Age 65 |
| Benefit | A monthly benefit equal to the Medicare Part B premium, which continues to the beneficiary if over 65 or under 65 and enrolled in Medicare Part B. The amount for 2012 is $99.90. |

| | |
|---|---|
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | Effective January 1, 2008, 60% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 60% of reduced benefit continues to surviving spouse. The reduction cannot be greater than the reduction prior to January 1, 2008 which was 5%. |
| Optional Forms of Annuity | 75% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Credited Service | The number of completed years and months from the date of hire to January 1, 1965 plus for each calendar year starting January 1, 1965, one year of credited service is earned when 1,700 hours are worked. Partial years are credited when less than 1,700 hours are worked. Accruals stopped on 2/28/2007 due to the plant closure. |
| Vesting Service | The number of completed years and months from date of hire to January 1, 1976 plus for each calendar year starting January 1, 1976, one year of vesting service is earned when 1,000 hours are worked. |

## Gilmour Manufacturing

**Effective Date**

September 1, 1978. The latest amendment dated December 16, 2010.

**Eligibility for Participation**

Hourly employees of Gilmour Manufacturing Company, excluding both employees covered by a collective bargaining agreement and salaried employees. Full-time employees who work at least 30 hours per week become participants at date of hire. Part-time employees become participants on January 1 or July 1 following one year of service.

**Normal Retirement**

**Eligibility**

Age 65.

**Benefit**

A monthly amount equal to (1) plus (2):

(1) Years of credited service multiplied by:

| Service Period | Amount |
|---|---|
| Service after 12/31/1996 | $13.25 |
| 1/1/1995 – 12/31/1996 | $12.00 |
| 9/1/1994 – 12/31/1994 (250 hours required) | $3.33 |
| 9/1/1992 – 8/31/1994 | $10.00 |
| 9/1/1978 – 8/31/1992 | $8.00 |

(2) $8.00 multiplied by pre 9/1/1978 service multiplied by the years of service to date divided by the years of service at Normal Retirement Date.

**Early Retirement**

**Eligibility**

Age 62 and 10 years of vesting service.

**Benefit**

A monthly benefit equal to the normal retirement benefit reduced by 0.6% for each month the early retirement precedes age 65.

**Vested Termination**

**Eligibility**

Five years of vesting service. A partial plan termination resulted due to the plant closing announcement on March 4, 2009. Participants who terminated after the plan closing announcement with less than five years of vesting service were 100% vested in their accrued benefit.

**Benefit**

The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement. The amount of the benefit shall be determined in the same manner as early retirement.

| | |
|---|---|
| Disability | |
| Eligibility | Ten years of vesting service. |
| Benefit | The accrued benefit based on service to the date of disability, commencing immediately. |
| Surviving Spouse | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning no earlier than the date the participant would have attained age 55 equal to 100% of the amount payable if the participant had retired early with a 100% joint-and-survivor benefit. |
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | 100% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 100% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | Five year certain and life annuity, ten year certain and life annuity, a 50% joint-and-survivor annuity and a 75% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Credited Service | The number of whole years worked as an hourly employee. Accruals stopped on 12/31/2009 due to the plant closure. |
| Vesting Service | The number of years an employee works 1,000 hours or more, excluding years prior to September 1, 1978. |

## Hagglunds Drive

| | |
|---|---|
| Effective Date | January 1, 2000. Amended and restated effective January 1, 2002. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | An employee that was a participant on December 31, 1999 of the MacGregor (USA), Inc. Salaried Pension Plan became a participant on January 1, 2000. No new participants can enter the plan after December 31, 1999. |
| Normal Retirement | |
| Eligibility | Age 65. |
| Benefit | A monthly amount equal to (1) plus (2) but not less than (3) or (4):<br><br>(1) 1.05% of average annual compensation up to covered compensation multiplied by years of credited service limited to 30 years.<br><br>(2) 1.50% of average annual compensation in excess of covered compensation multiplied by years of credited service limited to 30 years.<br><br>(3) The accrued benefit under the prior plan in effect December 31, 1989.<br><br>(4) The accrued benefit under the prior plan in effect December 31, 1995.<br><br>No credited service is earned after December 31, 1999. |
| Early Retirement | |
| Eligibility | Age 55 and 10 years of continuous service. Certain grandfathered participants are eligible to retire when their age plus service is greater than or equal to 75. |
| Benefit | A monthly benefit equal to the normal retirement benefit reduced by 1/3 of 1% for each month the early retirement precedes age 65.<br><br>For participants with more than 30 years of service, the benefit is reduced 1/3 of 1% for each month the early retirement precedes age 62.<br><br>Certain grandfathered participants have the reduction calculated from age 60. |

| | |
|---|---|
| Vested Termination | |
| Eligibility | Five years of vesting service. |
| Benefit | The accrued benefit at the date of termination. Reduced payments may begin any time after eligibility for early retirement. The amount of the benefit shall be determined in the same manner as early retirement. |
| Surviving Spouse | |
| Eligibility | Five years of vesting service. |
| Benefit | A monthly benefit payable to the surviving spouse beginning at the employee's earliest retirement age equal to 100% of the amount payable if the participant had retired early with a 100% joint-and-survivor benefit. |
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | 100% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 100% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | Lump sum payment if less than $5,000 and a 50% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Credited Service | Each participant shall be credited with the years of credited service with which he was credited under the prior plan as of December 31, 1999. No additional credited service will be grated for periods after December 31, 1999. |
| Vesting Service | The period from date of hire to date of termination. Partial years of service are credited on the basis of completed days. |

## Telex

| | |
|---|---|
| Effective Date | June 1, 1989. Amended and restated effective July 1, 1999. The latest amendment dated December 16, 2010. |
| Eligibility for Participation | An employee is eligible to participate in the plan upon completion of one year of service in which 1,000 or more hours were worked. Participation date is the first of the month following completion of the eligibility requirements. No new participants can enter the plan after June 30, 2003. |
| Normal Retirement | |
| Eligibility | Age 65. |
| Benefit | An account balance that consists of (1) plus (2) plus (3):<br>(1) Initial account balance which shall equal the sum of the actuarial present value of the accrued benefit under the plan in effect on June 30, 1999 plus the accumulated employee contributions as of January 1, 1982 increased with interest at 8% per year through June 30, 1999.<br>(2) Pay credits which shall be credited to the account balance as of December 31 of the current year. As of June 30, 2003, pay credits are no longer granted.<br>(3) Investment credit which is an amount equal to the account balance as of the first day of the current year multiplied by the investment credit rate in effect for the current year.<br>The account balance can be paid as a lump sum or an actuarially equivalent monthly annuity. Prior to distribution the account balance shall never be less than the actuarial present value of the accrued benefit under the plan at June 30, 1999. |
| Vested Termination | |
| Eligibility | Three years of vesting service. |
| Benefit | The accrued benefit at the date of termination. Prior to commencement the accrued benefit at termination will be credited with interest annually. |

| | |
|---|---|
| Surviving Spouse | |
| Eligibility | Three years of vesting service. |
| Benefit | The account balance paid as a lump sum or an actuarially equivalent life annuity. |
| Normal Form of Annuity | |
| Without Spouse | Single life annuity. |
| With Spouse | 100% Joint-and-survivor annuity reduced to be equivalent to the retirement benefit payable for employee's lifetime. Participant receives reduced lifetime benefit and, in event of participant's death, 100% of reduced benefit continues to surviving spouse. |
| Optional Forms of Annuity | Lump sum payment, a five year certain and life annuity, a ten year certain and life annuity and a 50% joint-and-survivor annuity. |
| Actuarial Equivalence | Applicable Mortality Table per Section 417(e)(3) of the Internal Revenue Code and 6% interest rate. |
| Definitions | |
| Vesting Service | A year of vesting service is earned for each calendar year that 1,000 or more hours of service are worked. |

## Plan Changes Since the Prior Year

The funding valuation does not reflect any plan changes.

## Other Information to Fully and Fairly Disclose the Actuarial Position of the Plan

Due to software limitations with the electronic filing process, information filed electronically cannot be controlled by the Enrolled Actuary. The values on the signed Schedule SB will govern to the extent there are any differences in the entries filed electronically and the actual data contained on the signed Schedule SB

As a result of a change in firms providing actuarial services, the Enrolled Actuary has changed from Nicole M. Stopoulos of Towers Watson to Karen A. Hirschhorn of Aon Hewitt.

This change has automatic approval under Announcement 2010-3.

# Schedule SB Attachment (Form 5500)—2012 Plan Year
# Pension Plan for Discontinued Operations of Robert Bosch
# EIN: 36-2903176 PN: 010

## Schedule SB, line 24—Change in Actuarial Assumptions

The funding valuation reflects the following assumption changes:

- A change in the cash balance interest crediting rate from 5.00% to 4.50%.
- A change in the cash balance annuity conversion rate from 6.00% to segment rates as of September 2011.

These changes were made to better reflect the anticipated plan experience. Neither of these assumption change reduced the funding shortfall by more than thresholds stated in Internal Revenue Code Section 430(h)(5); as such, approval of the Commissioner is not required.

# Schedule SB Attachment (Form 5500)—2012 Plan Year
# Pension Plan for Discontinued Operations of Robert Bosch
# EIN: 36-2903176 PN: 010

## Schedule SB, line 26—Schedule of Active Participant Data as of January 1, 2012

Number of Participants and Average Compensation

| Attained Age | Years of Credited Service | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | <1 | 1-4 | 5-9 | 10-14 | 15-19 | 20-24 | 25-29 | 30-34 | 35-39 | 40+ |
| <25 | | | | | | | | | | |
| 25-29 | | | | | | | | | | |
| 30-34 | | | | 4 | | | | | | |
| 35-39 | | | | 22<br>$30,000 | 2 | | | | | |
| 40-44 | | 2 | 1 | 28<br>$30,000 | 10 | 3 | | | | |
| 45-49 | | | 1 | 17 | 13 | 9 | 6 | 1 | | |
| 50-54 | | | 2 | 18 | 4 | 7 | 6 | 4 | 1 | |
| 55-59 | | 1 | 1 | 19 | 6 | 6 | 7 | 12 | 8 | 3 |
| 60-64 | | 1 | 1 | 14 | 2 | 3 | 5 | 7 | 6 | 4 |
| 65-69 | | | | 2 | 1 | 1 | | | 1 | 3 |
| 70+ | | | | | 1 | | | | | 1 |

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