

Form 5500

Annual Return/Report of Employee Benefit Plan

OMB Nos. 1210-0110 1210-0089

2023

This Form is Open to Public Inspection

Department of the Treasury Internal Revenue Service

Department of Labor Employee Benefits Security Administration

Pension Benefit Guaranty Corporation

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 6057(b) and 6058(a) of the Internal Revenue Code (the Code).

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

Part I Annual Report Identification Information

For calendar plan year 2023 or fiscal plan year beginning 10/01/2023 and ending 09/30/2024

- A This return/report is for: [] a multiemployer plan [] a multiple-employer plan... [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...
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...
E If this is a retroactively adopted plan permitted by SECURE Act section 201, check here... []

Part II Basic Plan Information—enter all requested information

1a Name of plan EVERGY, INC. JOINT TRUSTEED RETIREMENT PLAN
1b Three-digit plan number (PN) 002
1c Effective date of plan 10/01/1931
2a Plan sponsor's name (employer, if for a single-employer plan) Mailing address (include room, apt., suite no. and street, or P.O. Box) City or town, state or province, country, and ZIP or foreign postal code (if foreign, see instructions) EVERGY, INC. P. O. BOX 418679 KANSAS CITY, MO 64141-9679
2b Employer Identification Number (EIN) 82-2733395
2c Plan Sponsor's telephone number 816-556-2200
2d Business code (see instructions) 221100

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.

Table with 4 columns: SIGN HERE, Signature of plan administrator, Date, Enter name of individual signing as plan administrator. Includes entries for Theresa Dodson, Director, Benefits.

For Paperwork Reduction Act Notice, see the Instructions for Form 5500.

Form 5500 (2023) v. 230707

<p>3a Plan administrator's name and address <input type="checkbox"/> Same as Plan Sponsor</p> <p>EVERGY, INC. JOINT BOARD OF TRUSTEES</p> <p>P.O. BOX 418679 KANSAS CITY, MO 64141-9679</p>	<p>3b Administrator's EIN 82-2733395</p> <p>3c Administrator's telephone number 816-556-2200</p>
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<p>4 If the name and/or EIN of the plan sponsor or the plan name has changed since the last return/report filed for this plan, enter the plan sponsor's name, EIN, the plan name and the plan number from the last return/report:</p> <p>a Sponsor's name</p> <p>c Plan Name</p>	<p>4b EIN</p> <p>4d PN</p>
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5 Total number of participants at the beginning of the plan year	5	2060
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6 Number of participants as of the end of the plan year unless otherwise stated (welfare plans complete only lines 6a(1) , 6a(2) , 6b , 6c , and 6d).		
a(1) Total number of active participants at the beginning of the plan year	6a(1)	1112
a(2) Total number of active participants at the end of the plan year	6a(2)	1181
b Retired or separated participants receiving benefits	6b	348
c Other retired or separated participants entitled to future benefits	6c	402
d Subtotal. Add lines 6a(2) , 6b , and 6c	6d	1931
e Deceased participants whose beneficiaries are receiving or are entitled to receive benefits	6e	159
f Total. Add lines 6d and 6e	6f	2090
g(1) Number of participants with account balances as of the beginning of the plan year (only defined contribution plans complete this item)	6g(1)	
g(2) Number of participants with account balances as of the end of the plan year (only defined contribution plans complete this item)	6g(2)	
h Number of participants who terminated employment during the plan year with accrued benefits that were less than 100% vested	6h	3

7 Enter the total number of employers obligated to contribute to the plan (only multiemployer plans complete this item).....	7	
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8a If the plan provides pension benefits, enter the applicable pension feature codes from the List of Plan Characteristics Codes in the instructions:
1A 1C 3H

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

<p>9a Plan funding arrangement (check all that apply)</p> <p>(1) <input type="checkbox"/> Insurance</p> <p>(2) <input type="checkbox"/> Code section 412(e)(3) insurance contracts</p> <p>(3) <input checked="" type="checkbox"/> Trust</p> <p>(4) <input type="checkbox"/> General assets of the sponsor</p>	<p>9b Plan benefit arrangement (check all that apply)</p> <p>(1) <input type="checkbox"/> Insurance</p> <p>(2) <input type="checkbox"/> Code section 412(e)(3) insurance contracts</p> <p>(3) <input checked="" type="checkbox"/> Trust</p> <p>(4) <input type="checkbox"/> General assets of the sponsor</p>
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10 Check all applicable boxes in 10a and 10b to indicate which schedules are attached, and, where indicated, enter the number attached. (See instructions)

<p>a Pension Schedules</p> <p>(1) <input checked="" type="checkbox"/> R (Retirement Plan Information)</p> <p>(2) <input type="checkbox"/> MB (Multiemployer Defined Benefit Plan and Certain Money Purchase Plan Actuarial Information) - signed by the plan actuary</p> <p>(3) <input checked="" type="checkbox"/> SB (Single-Employer Defined Benefit Plan Actuarial Information) - signed by the plan actuary</p> <p>(4) <input type="checkbox"/> DCG (Individual Plan Information) – Number Attached _____</p> <p>(5) <input type="checkbox"/> MEP (Multiple-Employer Retirement Plan Information)</p>	<p>b General Schedules</p> <p>(1) <input checked="" type="checkbox"/> H (Financial Information)</p> <p>(2) <input type="checkbox"/> I (Financial Information – Small Plan)</p> <p>(3) <input type="checkbox"/> A (Insurance Information) – Number Attached <u> 0 </u></p> <p>(4) <input checked="" type="checkbox"/> C (Service Provider Information)</p> <p>(5) <input checked="" type="checkbox"/> D (DFE/Participating Plan Information)</p> <p>(6) <input type="checkbox"/> G (Financial Transaction Schedules)</p>
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Part III Form M-1 Compliance Information (to be completed by welfare benefit plans)

11a If the plan provides welfare benefits, was the plan subject to the Form M-1 filing requirements during the plan year? (See instructions and 29 CFR 2520.101-2.) Yes No

If "Yes" is checked, complete lines 11b and 11c.

11b Is the plan currently in compliance with the Form M-1 filing requirements? (See instructions and 29 CFR 2520.101-2.) Yes No

11c Enter the Receipt Confirmation Code for the 2023 Form M-1 annual report. If the plan was not required to file the 2023 Form M-1 annual report, enter the Receipt Confirmation Code for the most recent Form M-1 that was required to be filed under the Form M-1 filing requirements. (Failure to enter a valid Receipt Confirmation Code will subject the Form 5500 filing to rejection as incomplete.)

Receipt Confirmation Code _____

SCHEDULE SB (Form 5500) <small>Department of the Treasury Internal Revenue Service</small> <small>Department of Labor Employee Benefits Security Administration</small> <small>Pension Benefit Guaranty Corporation</small>	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.	<small>OMB No. 1210-0110</small> 2023 This Form is Open to Public Inspection
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For calendar plan year 2023 or fiscal plan year beginning 10/01/2023 and ending 09/30/2024

▶ **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 <u>EVERGY, INC. JOINT TRUSTEED RETIREMENT PLAN</u>	B Three-digit plan number (PN) ▶	<u>002</u>
C Plan sponsor's name as shown on line 2a of Form 5500 or 5500-SF <u>EVERGY, INC.</u>	D Employer Identification Number (EIN) <u>82-2733395</u>	
E Type of plan: <input checked="" type="checkbox"/> Single <input type="checkbox"/> Multiple-A <input type="checkbox"/> Multiple-B	F Prior year plan size: <input type="checkbox"/> 100 or fewer <input type="checkbox"/> 101-500 <input checked="" type="checkbox"/> More than 500	

Part I Basic Information

1	Enter the valuation date: Month <u>10</u> Day <u>01</u> Year <u>2023</u>		
2	Assets:		
	a Market value	2a	<u>170861119</u>
	b Actuarial value	2b	<u>181503620</u>
3	Funding target/participant count breakdown	(1) Number of participants	(2) Vested Funding Target
	a For retired participants and beneficiaries receiving payment	<u>531</u>	<u>43617854</u>
	b For terminated vested participants	<u>417</u>	<u>22643387</u>
	c For active participants	<u>1112</u>	<u>133073857</u>
	d Total	<u>2060</u>	<u>199335098</u>
4	If the plan is in at-risk status, check the box and complete lines (a) and (b)	<input type="checkbox"/>	
	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	<u>5.47 %</u>
6	Target normal cost		
	a Present value of current plan year accruals	6a	<u>13330411</u>
	b Expected plan-related expenses	6b	<u>1770000</u>
	c Target normal cost	6c	<u>15100411</u>

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	<u>06/19/2025</u>
	<u>JOHN M. CHMIELEWSKI</u>	Date
	Type or print name of actuary	<u>23-07661</u>
	<u>MILLIMAN, INC.</u>	Most recent enrollment number
	Firm name	<u>262-796-3379</u>
	<u>17335 GOLF PARKWAY, SUITE 100</u> <u>BROOKFIELD, WI 53045-6043</u>	Telephone number (including area code)
	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 and Prefunding Balances		(a) Carryover balance	(b) Prefunding balance
7	Balance at beginning of prior year after applicable adjustments (line 13 from prior year)	208433	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)	208433	0
10	Interest on line 9 using prior year's actual return of <u>10.04</u> %	20927	0
11	Prior year's excess contributions to be added to prefunding balance:		
	a Present value of excess contributions (line 38a from prior year)		7883496
	b(1) Interest on the excess, if any, of line 38a over line 38b from prior year Schedule SB, using prior year's effective interest rate of <u>5.62</u> %		443052
	b(2) Interest on line 38b from prior year Schedule SB, using prior year's actual return		0
	c Total available at beginning of current plan year to add to prefunding balance		8326548
	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)	229360	0

Part III Funding Percentages			
14	Funding target attainment percentage	14	88.26 %
15	Adjusted funding target attainment percentage	15	88.26 %
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	108.44 %
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		
01/10/2024	8470		09/05/2024	1254			
02/27/2024	14000		09/05/2024	15177			
02/27/2024	8890		09/05/2024	9032			
04/23/2024	8925		10/28/2024	29500			
04/23/2024	9170		10/28/2024	9222			
06/10/2024	9171		12/18/2024	17115000			
			Totals ▶	18(b)	18492811	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	17308468

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

Part II Beginning of Year Carryover and Prefunding Balances		(a) Carryover balance	(b) Prefunding balance
7	Balance at beginning of prior year after applicable adjustments (line 13 from prior year)		
8	Portion elected for use to offset prior year's funding requirement (line 35 from prior year)		
9	Amount remaining (line 7 minus line 8)		
10	Interest on line 9 using prior year's actual return of _____%		
11	Prior year's excess contributions to be added to prefunding balance:		
	a Present value of excess contributions (line 38a from prior year)		
	b(1) Interest on the excess, if any, of line 38a over line 38b from prior year Schedule SB, using prior year's effective interest rate of _____%		
	b(2) Interest on line 38b from prior year Schedule SB, using prior year's actual return		
	c Total available at beginning of current plan year to add to prefunding balance		
	d Portion of (c) to be added to prefunding balance		
12	Other reductions in balances due to elections or deemed elections		
13	Balance at beginning of current year (line 9 + line 10 + line 11d – line 12)		

Part III Funding Percentages			
14	Funding target attainment percentage	14	%
15	Adjusted funding target attainment percentage	15	%
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	%
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		
06/11/2025	1255000						
			Totals ▶	18(b)		18(c)	

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	
b Contributions made to avoid restrictions adjusted to valuation date	19b	
c Contributions allocated toward minimum required contribution for current year adjusted to valuation date	19c	

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

Part V Assumptions Used to Determine Funding Target and Target Normal Cost			
21 Discount rate:			
a Segment rates:	1st segment: 4.75 %	2nd segment: 5.00 %	<input type="checkbox"/> 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)	<input type="checkbox"/> Prescribed - combined	<input checked="" type="checkbox"/> Prescribed - separate	<input type="checkbox"/> 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..... <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
25 Has a method change been made for the current plan year? If "Yes," see instructions regarding required attachment. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
26 Demographic and benefit information			
a Is the plan required to provide a Schedule of Active Participants? If "Yes," see instructions regarding required attachment. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
b Is the plan required to provide a projection of expected benefit payments? If "Yes," see instructions regarding required attachment ... <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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 6c).....			31a 15100411
b Excess assets, if applicable, but not greater than line 31a			31b 0
32 Amortization installments:	Outstanding Balance		Installment
a Net shortfall amortization installment	24095969		2206726
b Waiver amortization installment			
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
34 Total funding requirement before reflecting carryover/prefunding balances (lines 31a - 31b + 32a + 32b - 33).....			34 17307137
	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 17307137
37 Contributions allocated toward minimum required contribution for current year adjusted to valuation date (line 19c).....			37 17308468
38 Present value of excess contributions for current year (see instructions)			
a Total (excess, if any, of line 37 over line 36)			38a 1331
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 the American Rescue Plan Act of 2021 (See Instructions)			
41 If an election was made to use the extended amortization rule for a plan year beginning on or before December 31, 2021, check the box to indicate the first plan year for which the rule applies. <input type="checkbox"/> 2019 <input type="checkbox"/> 2020 <input checked="" type="checkbox"/> 2021			

SCHEDULE C (Form 5500) <small>Department of the Treasury Internal Revenue Service</small> <small>Department of Labor Employee Benefits Security Administration</small> <small>Pension Benefit Guaranty Corporation</small>	Service Provider 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.	<small>OMB No. 1210-0110</small> 2023 This Form is Open to Public Inspection.
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For calendar plan year 2023 or fiscal plan year beginning **10/01/2023** and ending **09/30/2024**

A Name of plan EVERGY, INC. JOINT TRUSTEED RETIREMENT PLAN	B Three-digit plan number (PN) ▶	002
C Plan sponsor's name as shown on line 2a of Form 5500 EVERGY, INC.	D Employer Identification Number (EIN) 82-2733395	

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

SEI INVESTMENTS

23-1707341

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

SEI TRUST COMPANY

06-1271230

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

COMMERCE BANK

48-0962626

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

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

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)

SEI INVESTMENTS COMPANY

23-1707341

(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?
28 51	NONE	557712	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	0	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

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

MERCER

701 MARKET STREET
SUITE 1100
ST LOUIS, MO 63101

(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?
11 15 50	NONE	141178	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>		Yes <input type="checkbox"/> No <input type="checkbox"/>

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

COMMERCE BANK

48-0962626

(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?
19 28 50 51 59	NONE	111440	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	2542	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

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)

SPENCER FANE BRITT & BROWNE LLP

1000 WALNUT ST, STE 1400
KANSAS CITY, MO 64106

(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?
29 50	LEGAL	47367	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>		Yes <input type="checkbox"/> No <input type="checkbox"/>

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

MILLIMAN INC

91-0675641

(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?
11 50	NONE	30052	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>		Yes <input type="checkbox"/> No <input type="checkbox"/>

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

CBIZ CPAS P.C.

43-1947695

(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?
10 50	AUDITOR	29772	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>		Yes <input type="checkbox"/> No <input type="checkbox"/>

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)

WILLIS TOWERS WATSON US LLC

53-0181291

(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?
17 50	NONE	11340	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>		Yes <input type="checkbox"/> No <input type="checkbox"/>

(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 <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>		Yes <input type="checkbox"/> No <input type="checkbox"/>

(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 <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>		Yes <input type="checkbox"/> No <input type="checkbox"/>

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:	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:

a Name:	b EIN:
c Position:	
d Address:	e Telephone:

Explanation:

SCHEDULE D (Form 5500) <small>Department of the Treasury Internal Revenue Service</small> <small>Department of Labor Employee Benefits Security Administration</small>	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.	<small>OMB No. 1210-0110</small> 2023 This Form is Open to Public Inspection.
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For calendar plan year 2023 or fiscal plan year beginning 10/01/2023 and ending 09/30/2024

A Name of plan <u>EVERGY, INC. JOINT TRUSTEED RETIREMENT PLAN</u>	B Three-digit plan number (PN) ▶	<u>002</u>
C Plan or DFE sponsor's name as shown on line 2a of Form 5500 <u>EVERGY, INC.</u>	D Employer Identification Number (EIN) <u>82-2733395</u>	

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: <u>SEI CORE PROP. INV. COL. TRUST FUND</u>		
b Name of sponsor of entity listed in (a): <u>SEI TRUST COMPANY</u>		
c EIN-PN <u>27-3224429-045</u>	d Entity code <u>C</u>	e Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) <u>26387660</u>
a Name of MTIA, CCT, PSA, or 103-12 IE: <u>SEI SPECIAL SITUATIONS COL. FUND</u>		
b Name of sponsor of entity listed in (a): <u>SEI TRUST COMPANY</u>		
c EIN-PN <u>27-0977453-038</u>	d Entity code <u>C</u>	e Dollar value of interest in MTIA, CCT, PSA, or 103-12 IE at end of year (see instructions) <u>13583355</u>
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)

SCHEDULE H (Form 5500) <small>Department of the Treasury Internal Revenue Service</small> <small>Department of Labor Employee Benefits Security Administration</small> <small>Pension Benefit Guaranty Corporation</small>	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 2023 This Form is Open to Public Inspection
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For calendar plan year 2023 or fiscal plan year beginning 10/01/2023 and ending 09/30/2024	
A Name of plan EVERGY, INC. JOINT TRUSTEED RETIREMENT PLAN	B Three-digit plan number (PN) 002
C Plan sponsor's name as shown on line 2a of Form 5500 EVERGY, INC.	D Employer Identification Number (EIN) 82-2733395

Part I	Asset and Liability Statement
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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)	8266935
(2) Participant contributions	1b(2)	
(3) Other	1b(3)	419419
c General investments:		
(1) Interest-bearing cash (include money market accounts & certificates of deposit)	1c(1)	3677733
(2) U.S. Government securities	1c(2)	7248358
(3) Corporate debt instruments (other than employer securities):		
(A) Preferred	1c(3)(A)	
(B) All other	1c(3)(B)	20750747
(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)	39971015
(10) Value of interest in pooled separate accounts	1c(10)	
(11) Value of interest in master trust investment accounts	1c(11)	
(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)	101350980
(14) Value of funds held in insurance company general account (unallocated contracts)	1c(14)	
(15) Other	1c(15)	9172022

1d Employer-related investments:		(a) Beginning of Year	(b) End of Year
(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	170708692	200998996
Liabilities			
g Benefit claims payable	1g		
h Operating payables	1h	191024	281531
i Acquisition indebtedness	1i		
j Other liabilities	1j		
k Total liabilities (add all amounts in lines 1g through 1j)	1k	191024	281531
Net Assets			
l Net assets (subtract line 1k from line 1f)	1l	170517668	200717465

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)	18492811	
(B) Participants	2a(1)(B)		
(C) Others (including rollovers)	2a(1)(C)		
(2) Noncash contributions	2a(2)		18492811
(3) Total contributions. Add lines 2a(1)(A) , (B) , (C) , and line 2a(2)	2a(3)		
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)	338123	
(C) Corporate debt instruments	2b(1)(C)	1038155	
(D) Loans (other than to participants)	2b(1)(D)		
(E) Participant loans	2b(1)(E)		
(F) Other	2b(1)(F)	304241	
(G) Total interest. Add lines 2b(1)(A) through (F)	2b(1)(G)		1680519
(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)	2951899	
(D) Total dividends. Add lines 2b(2)(A) , (B) , and (C)	2b(2)(D)		2951899
(3) Rents	2b(3)		
(4) Net gain (loss) on sale of assets:			
(A) Aggregate proceeds	2b(4)(A)	6780429	
(B) Aggregate carrying amount (see instructions)	2b(4)(B)	7089484	
(C) Subtract line 2b(4)(B) from line 2b(4)(A) and enter result	2b(4)(C)		-309055
(5) Unrealized appreciation (depreciation) of assets:			
(A) Real estate	2b(5)(A)		
(B) Other	2b(5)(B)	3437148	
(C) Total unrealized appreciation of assets. Add lines 2b(5)(A) and (B)	2b(5)(C)		

		(a) Amount	(b) Total
(6) Net investment gain (loss) from common/collective trusts.....	2b(6)		42120
(7) Net investment gain (loss) from pooled separate accounts.....	2b(7)		
(8) Net investment gain (loss) from master trust investment accounts.....	2b(8)		
(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)		19251025
c Other income.....	2c		116
d Total income. Add all income amounts in column (b) and enter total.....	2d		45546583

Expenses

e Benefit payment and payments to provide benefits:			
(1) Directly to participants or beneficiaries, including direct rollovers.....	2e(1)	13091645	
(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)		13091645
f Corrective distributions (see instructions).....	2f		
g Certain deemed distributions of participant loans (see instructions).....	2g		
h Interest expense.....	2h		
i Administrative expenses:			
(1) Salaries and allowances.....	2i(1)		
(2) Contract administrator fees.....	2i(2)		
(3) Recordkeeping fees.....	2i(3)		
(4) IQPA audit fees.....	2i(4)	29772	
(5) Investment advisory and investment management fees.....	2i(5)	569052	
(6) Bank or trust company trustee/custodial fees.....	2i(6)	111440	
(7) Actuarial fees.....	2i(7)	30052	
(8) Legal fees.....	2i(8)	47367	
(9) Valuation/appraisal fees.....	2i(9)		
(10) Other trustee fees and expenses.....	2i(10)		
(11) Other expenses.....	2i(11)	1467458	
(12) Total administrative expenses. Add lines 2i(1) through (11)	2i(12)		2255141
j Total expenses. Add all expense amounts in column (b) and enter total.....	2j		15346786

Net Income and Reconciliation

k Net income (loss). Subtract line 2j from line 2d	2k		30199797
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) Unmodified (2) Qualified (3) Disclaimer (4) Adverse

b Check the appropriate box(es) to indicate whether the IQPA performed an ERISA section 103(a)(3)(C) audit. Check both boxes (1) and (2) if the audit was performed pursuant to both 29 CFR 2520.103-8 and 29 CFR 2520.103-12(d). Check box (3) if pursuant to neither.

(1) DOL Regulation 2520.103-8 (2) DOL Regulation 2520.103-12(d) (3) neither DOL Regulation 2520.103-8 nor DOL Regulation 2520.103-12(d).

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

(1) Name: **CBIZ CPAS P.C.**

(2) EIN: **43-1947695**

d The opinion of an independent qualified public accountant is **not attached** as part of Schedule H because:

(1) This form is filed for a CCT, PSA, DCG 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. DCGs do not complete lines 4e, 4f, 4k, 4l, and 5, and DCGs generally complete the rest of Part IV collectively for all plans in the DCG, except as otherwise provided (see instructions).

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.)		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.).....		X	
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.)		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.).....		X	
e Was this plan covered by a fidelity bond?.....	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?		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?		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?.....		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.).....	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.).....	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?		X	
l Has the plan failed to provide any benefit when due under the plan?		X	
m If this is an individual account plan, was there a blackout period? (See instructions and 29 CFR 2520.101-3.).....		X	
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.			

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

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)

5c Was the plan a defined benefit plan covered under the PBGC insurance program at any time during this plan year? (See ERISA section 4021 and instructions.) Yes No Not determined

If "Yes" is checked, enter the My PAA confirmation number from the PBGC premium filing for this plan year 537466.

SCHEDULE R (Form 5500) <small>Department of the Treasury Internal Revenue Service</small> <small>Department of Labor Employee Benefits Security Administration</small> <small>Pension Benefit Guaranty Corporation</small>	Retirement Plan Information This schedule is required to be filed under sections 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.	<small>OMB No. 1210-0110</small> 2023 This Form is Open to Public Inspection.
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For calendar plan year 2023 or fiscal plan year beginning **10/01/2023** and ending **09/30/2024**

A Name of plan EVERGY, INC. JOINT TRUSTEED RETIREMENT PLAN	B Three-digit plan number (PN) ▶	002
C Plan sponsor's name as shown on line 2a of Form 5500 EVERGY, INC.	D Employer Identification Number (EIN) 82-2733395	

Part I	Distributions
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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
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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): 43-6334070

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	34
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Part II	Funding Information (If the plan is not subject to the minimum funding requirements of section 412 of the Internal Revenue Code or ERISA section 302, skip this Part.)
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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
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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 (1) contributed more than 5% of total contributions to the plan during the plan year or (2) was one of the top-ten highest contributors (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 deferred vested and retired participants (inactive participants), as of the beginning of the plan year, whose contributing employer is no longer making contributions to the plan for:

a The current plan year. Check the box to indicate the counting method used to determine the number of inactive participants: <input type="checkbox"/> last contributing employer <input type="checkbox"/> alternative <input type="checkbox"/> reasonable approximation (see instructions for required attachment)	14a	
b The plan year immediately preceding the current plan year. <input type="checkbox"/> Check the box if the number reported is a change from what was previously reported (see instructions for required attachment)	14b	
c The second preceding plan year. <input type="checkbox"/> Check the box if the number reported is a change from what was previously reported (see instructions for required attachment).....	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) and (b):

a Enter the percentage of plan assets held as:
 Public Equity: 39.0 % Private Equity: 0.0 % Investment-Grade Debt and Interest Rate Hedging Assets: 24.0 %
 High-Yield Debt: 3.0 % Real Assets: 0.0 % Cash or Cash Equivalents: 3.0 % Other: 31.0 %

b Provide the average duration of the Investment-Grade Debt and Interest Rate Hedging Assets:
 0-5 years 5-10 years 10-15 years 15 years or more

20 PBGC missed contribution reporting requirements. If this is a multiemployer plan or a single-employer plan that is not covered by PBGC, skip line 20.

a Is the amount of unpaid minimum required contributions for all years from Schedule SB (Form 5500) line 40 greater than zero? Yes No

b If line 20a is "Yes," has PBGC been notified as required by ERISA sections 4043(c)(5) and/or 303(k)(4)? Check the applicable box:
 Yes.
 No. Reporting was waived under 29 CFR 4043.25(c)(2) because contributions equal to or exceeding the unpaid minimum required contribution were made by the 30th day after the due date.
 No. The 30-day period referenced in 29 CFR 4043.25(c)(2) has not yet ended, and the sponsor intends to make a contribution equal to or exceeding the unpaid minimum required contribution by the 30th day after the due date.
 No. Other. Provide explanation.....

Part VII IRS Compliance Questions

21a Does the plan satisfy the coverage and nondiscrimination tests of Code sections 410(b) and 401(a)(4) by combining this plan with any other plans under the permissive aggregation rules? Yes No

21b If this is a Code section 401(k) plan, check all boxes that apply to indicate how the plan is intended to satisfy the nondiscrimination requirements for employee deferrals and employer matching contributions (as applicable) under Code sections 401(k)(3) and 401(m)(2).
 Design-based safe harbor method
 "Prior year" ADP test
 "Current year" ADP test
 N/A

22 If the plan sponsor is an adopter of a pre-approved plan that received a favorable IRS Opinion Letter, enter the date of the Opinion Letter ___/___/___ (MM/DD/YYYY) and the Opinion Letter serial number _____.



**EVERGY, INC. JOINT TRUSTEED
RETIREMENT PLAN**

Employer ID No.: 82-2733395
Plan Number: 002

Financial Statements as of and for the
Years Ended September 30, 2024 and 2023,
Supplemental Schedules as of and for the
Year Ended September 30, 2024, and
Independent Auditors' Report

**EVERGY, INC.
JOINT TRUSTEED RETIREMENT PLAN**

TABLE OF CONTENTS

	Page
INDEPENDENT AUDITORS' REPORT – CBIZ CPAs P.C.	1–4
FINANCIAL STATEMENTS:	
Statements of Net Assets Available for Benefits as of September 30, 2024 and 2023	5
Statements of Changes in Net Assets Available for Benefits for the Years Ended September 30, 2024 and 2023	6
Notes to Financial Statements as of and for the Years Ended September 30, 2024 and 2023	7–15
SUPPLEMENTAL SCHEDULES:	16
Form 5500, Schedule H, Part IV, Line 4i — Schedule of Assets (Held at End of Year) as of September 30, 2024	17–25
Form 5500, Schedule H, Part IV, Line 4j — Schedule of Reportable Transactions for the Year Ended September 30, 2024	26
NOTE: All other 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 been omitted because they are not applicable.	

INDEPENDENT AUDITORS' REPORT

Participants and Board of Trustees
Eversource Energy, Inc. Joint Trusteed Retirement Plan

Scope and Nature of the ERISA Section 103(a)(3)(C) Audit

We have performed the audits of the financial statements of the Eversource Energy, Inc. Joint Trusteed Retirement Plan ("the Plan"), an employee benefit plan subject to the Employee Retirement Income Security Act of 1974 ("ERISA"), as permitted by ERISA Section 103(a)(3)(C) ("ERISA Section 103(a)(3)(C) audit"). The financial statements comprise the statements of net assets available for benefits as of September 30, 2024 and 2023, 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, having determined it is permissible in the circumstances, has elected to have the audits of the Plan's financial statements performed in accordance with ERISA Section 103(a)(3)(C) pursuant to 29 CFR 2520.103-8 of the Department of Labor's Rules and Regulations for Reporting and Disclosure under ERISA. As permitted by ERISA Section 103(a)(3)(C), our audits need not extend to any statements or information related to assets held for investment of the Plan ("investment information") by a bank or similar institution or insurance carrier that is regulated, supervised, and subject to periodic examination by a state or federal agency, provided that the statements or information regarding assets so held are prepared and certified to by the bank or similar institution or insurance carrier in accordance with 29 CFR 2520.103-5 of the Department of Labor's Rules and Regulations for Reporting and Disclosure under ERISA ("qualified institution").

Management has obtained certifications from a qualified institution as of September 30, 2024 and 2023 and for the years then ended, stating that the certified investment information, as described in Note 5 to the financial statements, is complete and accurate.

Opinion

In our opinion, based on our audits and on the procedures performed as described in the Auditors' Responsibilities for the Audit of the Financial Statements section:

- The amounts and disclosures in the accompanying financial statements, other than those agreed to or derived from the certified investment information, are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States of America.
- The information in the accompanying financial statements related to assets held by and certified to by a qualified institution agrees to, or is derived from, in all material respects, the information prepared and certified by an institution that management determined meets the requirements of ERISA Section 103(a)(3)(C).

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America (“GAAS”). Our responsibilities under those standards are further described in the Auditors’ Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Plan and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our ERISA Section 103(a)(3)(C) audit opinion.

Responsibilities of Management 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, and for 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. Management's election of the ERISA Section 103(a)(3)(C) audit does not affect management's responsibility for the financial statements.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Plan's ability to continue as a going concern within one year after the date that the financial statements are issued or available to be issued.

Management is also responsible for maintaining a current plan instrument, including all plan amendments, administering the Plan, and determining that the Plan's transactions that are presented and disclosed in the financial statements are in conformity with the Plan's provisions, including maintaining sufficient records with respect to each of the participants, to determine the benefits due or which may become due to such participants.

Auditors’ Responsibilities for the Audit of the Financial Statements

Except as described in the Scope and Nature of the ERISA Section 103(a)(3)(C) Audit section of our report, our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors’ report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on these financial statements.

In performing an audit in accordance with GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.

- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Plan's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Plan's ability to continue as a going concern for a reasonable period of time.

Our audits did not extend to the certified investment information, except for obtaining and reading the certifications, comparing the certified investment information with the related information presented and disclosed in the financial statements, and reading the disclosures relating to the certified investment information to assess whether they are in accordance with the presentation and disclosure requirements of accounting principles generally accepted in the United States of America.

Accordingly, the objective of an ERISA Section 103(a)(3)(C) audit is not to express an opinion about whether the financial statements as a whole are presented fairly, in all material respects, in accordance with accounting principles generally accepted in the United States of America.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Other Matter - Supplemental Schedules Required by ERISA

The supplemental schedule of assets (held at end of year) as of September 30, 2024 and supplemental schedule of reportable transactions for the year ended September 30, 2024, are presented for purposes of additional analysis and are not a required part of the financial statements but are supplementary information required by the Department of Labor's Rules and Regulations for Reporting and Disclosure under ERISA. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information included in the supplemental schedules, other than that agreed to or derived from the certified investment information, has been subjected to auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with GAAS. For information included in the supplemental schedules that agreed to or is derived from the certified investment information, we compared such information to the related certified investment information.

In forming our opinion on the supplemental schedules, we evaluated whether the supplemental schedules, other than the information agreed to or derived from the certified investment information, including their form and content, are presented in conformity with the Department of Labor's Rules and Regulations for Reporting and Disclosure under ERISA.

In our opinion:

- The form and content of the supplemental schedules, other than the information in the supplemental schedules that agreed to or is derived from the certified investment information, are presented, in all material respects, in conformity with the Department of Labor's Rules and Regulations for Reporting and Disclosure under ERISA.
- The information in the supplemental schedules related to assets held by and certified to by a qualified institution agrees to, or is derived from, in all material respects, the information prepared and certified by an institution that management determined meets the requirements of ERISA Section 103(a)(3)(C).

CBIZ CPAs P.C.

Kansas City, Missouri
July 11, 2025

EVERGY, INC.
JOINT TRUSTEED RETIREMENT PLAN

STATEMENTS OF NET ASSETS AVAILABLE FOR BENEFITS
AS OF SEPTEMBER 30, 2024 AND 2023

	2024	2023
ASSETS:		
Investments — at fair value:		
Mutual funds	\$ 101,350,980	\$ 74,157,383
Bonds	37,171,127	33,929,177
Money market funds	3,677,733	4,092,515
Common collective trusts	<u>39,971,015</u>	<u>49,852,612</u>
 Total investments	 <u>182,170,855</u>	 <u>162,031,687</u>
Receivables:		
Employer contributions receivable	18,408,722	8,266,935
Accrued investment income	<u>419,419</u>	<u>410,070</u>
 Total receivables	 <u>18,828,141</u>	 <u>8,677,005</u>
 Total assets	 <u>200,998,996</u>	 <u>170,708,692</u>
LIABILITIES:		
Accrued administrative expenses	<u>281,531</u>	<u>191,024</u>
 NET ASSETS AVAILABLE FOR BENEFITS	 <u>\$ 200,717,465</u>	 <u>\$ 170,517,668</u>

See notes to financial statements.

EVERGY, INC.
JOINT TRUSTEED RETIREMENT PLAN

STATEMENTS OF CHANGES IN NET ASSETS AVAILABLE FOR BENEFITS
FOR THE YEARS ENDED SEPTEMBER 30, 2024 AND 2023

	2024	2023
EMPLOYER CONTRIBUTIONS	\$ 18,492,811	\$ 8,418,155
INVESTMENT INCOME (LOSS) :		
Net appreciation in fair value of investments:		
Realized gain (loss) on sale of investments	7,455,046	(7,618,546)
Unrealized gain in fair value of investments	14,966,192	21,335,756
Other income	116	-
Net appreciation in fair value of investments	22,421,354	13,717,210
Interest	1,680,519	1,624,972
Dividends	2,951,899	3,049,150
Net investment income	27,053,772	18,391,332
Total additions	45,546,583	26,809,487
DEDUCTIONS:		
Benefits paid directly to participants	13,091,645	88,869,108
Administrative expenses	2,255,141	1,847,675
Total deductions	15,346,786	90,716,783
NET INCREASE (DECREASE)	30,199,797	(63,907,296)
NET ASSETS AVAILABLE FOR BENEFITS:		
Beginning of year	170,517,668	234,424,964
End of year	\$ 200,717,465	\$ 170,517,668

See notes to financial statements.

EVERGY, INC.

JOINT TRUSTEED RETIREMENT PLAN

NOTES TO FINANCIAL STATEMENTS AS OF AND FOR THE YEARS ENDED SEPTEMBER 30, 2024 AND 2023

1. DESCRIPTION OF THE PLAN

The following description of the Evergy, Inc. Joint Trusteed Retirement Plan (the Plan) provides only general information. Participants should refer to the Plan document for more complete information.

General — The Plan is a non-contributory defined benefit pension plan, sponsored by Evergy, Inc., (the Company), covering employees of Evergy Metro, Inc. who have completed six months of service and who are currently or previously covered by collective bargaining agreements between the Company and one or more of the Local Unions No. 412, 1464, or 1613 of the International Brotherhood of Electrical Workers. The operation and administration of the Plan is controlled and managed by a Board of Joint Trustees comprised of employees of the Company and the business agents from Locals 412, 1464, and 1613. The Commerce Trust Company is the custodian of the Plan. The Plan is subject to the provisions of the Employee Retirement Income Security Act of 1974 (ERISA).

Pension Benefits — Traditional Formula - Participants hired prior to October 1, 2013 with five years of vesting service (or who attain age 55 after completing at least six months of service), as defined by the Plan, are entitled to pension benefits upon retirement. Pension benefits are provided to participants based upon years of service, age, and salary. Retirement benefits are paid to pensioners or beneficiaries in various forms of joint and survivor annuities, including a lump-sum payment option.

Cash-Balance Formula — Effective October 1, 2013, the Plan was amended and restated to reflect a change in the benefit formula for new or rehired employees. These employees will participate in the Plan but will accrue benefits based on a cash-balance pension formula. The six-month “waiting period” in which the first six months of service do not count for benefit accrual purposes, does not apply to cash-balance participants. Cash-balance benefits are subject to a three-year cliff vesting schedule.

2. SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Basis of Accounting — The accompanying financial statements have been prepared in accordance with accounting principles generally accepted in the United States of America (GAAP).

Use of Estimates — The preparation of financial statements in conformity with GAAP requires management 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 and changes therein at the date of the financial statements. Actual results could differ from those estimates.

Risks, Uncertainties and Concentrations — The Plan utilizes various investment securities including bonds, mutual funds, common collective trusts (CCT) and a money market fund. Investment securities, in general, are exposed to various risks, such as interest rate risk, credit risk. Market risks include global events which could impact the value of investment securities, such as a pandemic or international conflict. Due to the level of risk associated with certain investment securities, it is 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 financial statements. At September 30, 2024 and 2023,

approximately 34% and 37%, respectively, of the Plan's investments were invested in the SEI Core Property Collective Fund and the SEI World Equity Ex US Fund.

Plan contributions are made and the actuarial present value of accumulated plan benefits are 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 estimation and assumption process, it is a least reasonably possible that changes in these estimates and assumptions in the near term would be material to the financial statements.

Investment Valuation and Income Recognition — Investments are reported at fair value. Fair value of a financial instrument is the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. Investments in the CCTs are valued at net asset value (NAV) practical expedient, which have been determined by the issuer of the fund based on the unit values of the funds. The fair value of publicly-traded bonds, corporate bonds and notes instruments, and the mutual funds are based on the last reported market price on the last business day of the year. The money market funds are valued at cost, which approximates fair value.

Purchases and sales of investments are recorded on a trade-date basis. Interest income is recorded on the accrual basis. Dividends are recorded on the ex-dividend date. Net appreciation includes the Plan's gains and losses on investments bought and sold as well as held during the year.

Common Collective Trust Funds —

Real Estate Fund — The SEI Core Property Collective Fund invests substantially all of its assets in the SEI Core Property Fund L.P. The real estate investments are stated at fair value, determined by an independent appraisal of the underlying real estate of the partnership. These fair values are adjusted for estimated selling costs at the time an investment is determined to be held for sale and if there has been a significant change in economic circumstances related to the investment since acquisition or the most recent independent valuation. The values of the underlying real estate are estimated using generally accepted valuation techniques. The Plan may request redemption of all or a portion of its units as of the end of a calendar quarter by delivering written notice to the holder of the fund at least 105 days prior to the end of the quarter. Redemption requests are subject to certain restrictions and the availability of cash. Total redemption requests are subject to a 10% escrow pending completion of the next annual audit.

Hedge Fund — The hedge fund investments are in a common/collective trust, SEI Special Situations Collective Fund. The SEI Special Situations Collective Fund is part of a "fund of funds" complex, by which the fund invests substantially all of its assets in the SEI Special Situations Collective Investment Trust. This structure provides a means for eligible investors to participate in investments in various private investment funds, many of which will pursue hedged investment strategies. The net asset value of the fund is determined as of the close of business at the end of each month, on a one-month lag based on the valuations of the underlying investment funds. The Plan may request redemption of all or a portion of its investment on a semi-annual basis on June 30 and December 31 by delivering written notice to the holder of the fund at least 95 days prior to the semi-annual redemption dates. Total redemption requests are subject to a 10% escrow pending completion of the next annual audit.

Expenses — Administrative expenses of the Plan are paid by the Plan or the Company, as provided in the Plan document. Investment related expenses are included in net appreciation of fair value of investments.

Payment of Benefits — Benefit payments to participants are recorded when paid.

3. FUNDING POLICY

Contributions to provide benefits under the Plan are made by the Company. The Company's funding policy is to maintain a balance such that Plan resources will fund Plan obligations. In implementing this funding policy, the Board of Joint Trustees regularly reviews the Plan's assets and liabilities and takes actions or makes recommendations necessary to ensure that the funding of the Plan meets both the objectives of the Plan and requirements of Title I of ERISA. The Company met the minimum funding requirements of ERISA for the years ended September 30, 2024 and 2023.

4. ACCUMULATED PLAN BENEFITS

Accumulated benefits are those future periodic payments, including lump-sum distributions, that are attributable under the Plan's provisions to service rendered by employees as of the valuation date. Accumulated plan benefits include benefits expected to be paid to (1) retired or terminated employees or their beneficiaries, (2) beneficiaries of employees who have died, and (3) present employees or their beneficiaries. The actuarial present value of accumulated plan benefits is determined by an independent actuary and is the amount that results from applying actuarial assumptions to adjust the accumulated plan benefits 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 effect of plan amendments on accumulated plan benefits is recognized during the year in which such amendments are adopted.

Actuarial valuations of accumulated plan benefits were prepared by the actuary as of October 1, 2024 and 2023. Had the valuations been performed as of September 30, 2024 and 2023, there would be no material difference.

The actuarial present value of accumulated plan benefits as of October 1, 2024 and 2023, is as follows:

	2024	2023
Vested benefits:		
Participants and/or beneficiaries currently receiving benefits	\$ 37,855,828	\$ 39,899,105
Other participants	<u>154,072,866</u>	<u>143,774,569</u>
Total vested benefits	191,928,694	183,673,674
Nonvested benefits	<u>5,991,007</u>	<u>5,359,957</u>
Total actuarial present value of accumulated plan benefits	<u>\$ 197,919,701</u>	<u>\$ 189,033,631</u>

The changes in the actuarial present value of the Plan’s accumulated plan benefits for the years ended October 1, 2024 and 2023, are as follows:

	2024	2023
Actuarial present value of accumulated plan benefits at beginning of plan year	\$ 189,033,631	\$ 231,285,808
Increase (decrease) during the year attributable to:		
Benefits accumulated	15,599,653	42,449,957
Benefits paid	(13,091,645)	(88,869,108)
Change in assumptions	(5,033,626)	(7,553,317)
Interest due to the decrease in the discount period	<u>11,411,688</u>	<u>11,720,291</u>
Actuarial present value of accumulated plan benefits at end of plan year	<u>\$ 197,919,701</u>	<u>\$ 189,033,631</u>

The significant actuarial assumptions used in the October 1, 2024 and 2023, valuations were:

- Mortality 2024 and 2023— Pri-2012 Total Dataset Mortality table, utilizing improvement scale of MP-2021, applied generationally.
- Retirement rates: 2024 and 2023 – 100% of participants age 70 or older, 25% of those ages 66-69, 35% of those age 65, 25% of those ages 62-64, and 5% of those ages 55-61. For active participants between ages 57 and 61 with 30 or more years of service, the assumed rate is increased by 5%.
- Interest rate assumptions: 6.25% in 2024 and 2023.

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

5. INFORMATION CERTIFIED BY THE CUSTODIAN

The Plan’s investments are held by The Commerce Trust Company, the custodian of the Plan. The following is a summary of the unaudited information regarding the Plan’s investments held by the Plan’s custodian as of September 30, 2024 and 2023, and for the years then ended, included in the Plan’s financial statements and supplemental schedules, that were prepared by or derived from information

prepared by the custodian of the Plan and furnished to the plan administrator. The plan administrator has obtained certifications from the custodian that such information is complete and accurate.

	2024	2023
Statements of net assets available for benefits:		
Investments at fair value:		
Mutual funds	\$ 101,350,980	\$ 74,151,383
Bonds	37,171,127	33,929,177
Money market funds	3,677,733	4,092,515
Common collective trusts	39,917,015	49,852,612
Accrued investment income	419,419	410,070
Statements of changes in net assets available for benefits — investment income (loss):		
Interest	1,680,519	1,624,972
Dividends	2,951,899	3,049,150
Net appreciation in fair value of investments:		
Realized gain (loss) on sale of investments	7,455,046	(7,618,546)
Unrealized gain in fair value of investments	14,966,192	21,335,756
Other income	116	-

All investment balances included in Notes 6, 7 and supplemental schedules, have been certified by the custodian, except for the classification of investments in Note 6.

6. FAIR VALUE OF INVESTMENTS

In accordance with Financial Accounting Standards Board (FASB) Accounting Standards Codification (ASC) 820, the Plan classifies its investments into Level 1, which refers to securities valued using quoted prices from active markets for identical assets, Level 2, which refers to securities not traded on an active market but for which observable market inputs are readily available, and Level 3, which refers to securities valued based on significant unobservable inputs. Assets and liabilities are classified in their entirety based on the lowest level of input that is significant to the fair value measurement. The Plan's policy is to recognize significant transfers between levels at the end of the reporting period. As required by ASC 820, at September 30, 2024 and 2023, the Plan's portfolio of investments was classified as follows, based on fair values:

	Total September 30, 2024	Quoted Prices in Active Markets for Identical Assets (Level 1)	Significant Other Observable Inputs (Level 2)	Significant Unobservable Inputs (Level 3)
Mutual funds ^(a)	\$ 101,350,980	\$ 101,350,980	\$ -	\$ -
Bonds	37,171,127	5,450,730	30,473,290	1,247,107
Money market funds	<u>3,677,733</u>	<u>3,677,733</u>	-	-
Total Investments in the Fair Value Hierarchy	<u>\$ 142,199,840</u>	<u>\$ 110,479,443</u>	<u>\$ 30,473,290</u>	<u>\$ 1,247,107</u>
Common Collective Trust Funds Investments measured at NAV practical expedient ^{(b)(c)}	<u>39,971,015</u>			
Total Investments at Fair Value	<u>\$ 182,170,855</u>			

	Total September 30, 2023	Quoted Prices in Active Markets for Identical Assets (Level 1)	Significant Other Observable Inputs (Level 2)	Significant Unobservable Inputs (Level 3)
Mutual funds ^(a)	\$ 74,157,383	\$ 74,157,383	\$ -	\$ -
Bonds	33,929,177	4,268,499	27,402,396	2,258,282
Money market funds	<u>4,092,515</u>	<u>4,092,515</u>	-	-
Total Investments in the Fair Value Hierarchy	<u>\$ 112,179,075</u>	<u>\$ 82,518,397</u>	<u>\$ 27,402,396</u>	<u>\$ 2,258,282</u>
Common Collective Trust Funds Investments measured at NAV practical expedient ^{(b)(c)}	<u>49,852,612</u>			
Total Investments at Fair Value	<u>\$ 162,031,687</u>			

^(a) This category is comprised of traded mutual funds valued at daily listed prices per share.

^(b) This category is comprised of a limited partnership interest valued at NAV per share (or its equivalent) on a quarterly basis and hedge fund interests valued at NAV per share (or its equivalent) on a monthly or quarterly basis and are not categorized in the fair value hierarchy.

^(c) In accordance with Subtopic 820-10, certain investments that were measured at fair value using the net asset value per share (or its equivalent) practical expedient have not been classified in the fair value hierarchy. The fair value amounts presented in this table are intended to permit reconciliation of the fair value hierarchy to the amounts presented in the statements of net assets available for benefits.

The valuation methods described in Note 2 may produce a fair value calculation that may not be indicative of net realizable value or reflective of future values. Furthermore, although the Plan 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. The tables below set forth a summary of changes in the fair value of the Plan's level 3 assets for the years ended September 30, 2024 and 2023:

2024	Bonds
Balance, beginning of year	\$ 2,258,282
Realized gain	(36,996)
Unrealized loss	155,519
Sales	(999,513)
Transfers in and/or out of Level 3 (net)	<u>(130,185)</u>
Balance, end of year	<u>\$ 1,247,107</u>

2023	Bonds
Balance, beginning of year	\$ 2,292,354
Realized gain	(33,662)
Unrealized gain	(39,823)
Sales	(354,018)
Transfers in and/or out of Level 3 (net)	<u>393,431</u>
Balance, end of year	<u>\$ 2,258,282</u>

We evaluated the significance of transfers between levels based upon the nature of the financial instrument and size of the transfer relative to total net assets available for benefits. The net transfers in and out of level 3, to or from level 2, were the result of changes in the availability of observable market data for the individual securities transferred.

7. NET ASSET VALUE (NAV) PER SHARE PRACTICAL EXPEDIENT

The following table for September 30, 2024 and 2023 sets forth a summary of the Plan's investments with a reported NAV.

Investment	Fair Value – September 30, 2024*	Fair Value – September 30, 2023*	Redemption Frequency	Other Redemption Restrictions	Redemption Notice Period
SEI Core Property Collective Fund (a)	\$26,387,660	\$33,480,624	Quarterly (a)	10% escrow on total redemption pending annual audit	105 days
SEI Special Situations Collective Fund (b)	13,583,355	16,371,988	Semi-annual (b)	10% escrow on total redemption pending annual audit	95 days

*The fair values of the investments have been estimated using the net asset value of the investment.

(a) The fund is in a common collective trust that invests in a real estate limited partnership which primarily holds equity real estate investments located in the United States. The fund pursues U.S. Core Real Estate strategies. The real estate investment is stated at fair value, determined by an independent appraisal of the underlying real estate of the partnership. Redemption requests are subject to certain restrictions and the availability of cash.

(b) The hedge fund strategies seek to provide a long-term return of 5.50% over cash that exceeds traditional assets while serving as a diversifier to traditional markets. The fund is valued at the close of business each quarter determined by obtaining the underlying investee fund valuations.

8. EXEMPT PARTY-IN-INTEREST TRANSACTIONS

Certain Plan investments are shares of mutual funds managed by SEI Investments Company (SEI). SEI is an investment manager as defined by the Plan, and therefore, these transactions qualify as exempt party-in-interest transactions. Fees incurred by the plan for the investment management services are included in net appreciation in fair value of the investment, as they are paid through revenue sharing, rather than a direct payment. Fees paid directly to SEI totaled \$557,712 and \$643,863 for the years ended September 30, 2024 and 2023, respectively. The Commerce Trust Company is the custodian of the Plan. Fees paid directly to Commerce totaled \$111,440 and \$114,554 for the years ended September 30, 2024 and 2023, respectively.

9. FEDERAL INCOME TAX STATUS

The Internal Revenue Service (IRS) has determined and informed the Company by a letter dated April 24, 2015, that the Plan and related trust were designed in accordance with the applicable regulations of the Internal Revenue Code (IRC). It is the intent of the Company and the Plan management that plan operation and any future amendments made to the Plan are in compliance with the applicable requirements of the IRC and the Plan and related trust continue to be tax-exempt. Therefore, no provision for income taxes has been included in the Plan's financial statements.

GAAP requires plan management to evaluate tax positions taken by the Plan and recognize a tax liability (or asset) if the Plan has taken an uncertain position that more likely than not would not be sustained upon

examination by the IRS. The Plan is subject to routine audits by taxing jurisdictions; however, there are currently no audits for any tax periods in progress.

10. PLAN TERMINATION

Although it has not expressed any intention to do so, the Company has the right under the Plan, in certain circumstances, to discontinue its contributions at any time and to terminate the Plan subject to the provisions set forth in ERISA. In the event that the Plan is terminated, the net assets of the Plan will be allocated for payment of plan benefits to the participants in an order of priority determined in accordance with ERISA, applicable regulations thereunder and the Plan document.

Certain benefits under the Plan are insured by the Pension Benefit Guaranty Corporation (PBGC) if the Plan terminates. Generally, the PBGC guarantees most vested normal age retirement benefits, early retirement benefits, and certain disability and survivor's pensions. However, the PBGC does not guarantee all types of benefits under the Plan, and the amount of benefit protection is subject to certain limitations. Vested benefits under the Plan are guaranteed at the level in effect on the date of the Plan's termination, subject to a statutory ceiling on the amount of an individual's monthly benefit.

Whether all participants receive their benefits should the Plan be terminated at some future time will depend on the sufficiency, at that time, of the Plan's net assets to provide those benefits, the priority of those benefits to be paid and the level and type of benefits guaranteed by the PBGC at that time. Some benefits may be fully or partially provided for by the then existing assets and the PBGC guaranty while other benefits may not be provided for at all.

11. SUBSEQUENT EVENTS

For the year ended September 30, 2024, subsequent events were evaluated through July 11, 2025, the date the financial statements were available to be issued. No significant matters were identified for disclosure during this evaluation.

* * * * *

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Line 26a – Schedule of Active Participant Data

The number of **all** active participants, summarized by attained age and years of credited service as of October 1, 2023, is shown below.

Age	Years of Credited Service										Total	
	0	1-4	5-9	10-14	15-19	20-24	25-29	30-34	35-39	40+		
0-24	21	31	-	-	-	-	-	-	-	-	-	52
25-29	24	37	17	-	-	-	-	-	-	-	-	78
30-34	14	27	31	10	-	-	-	-	-	-	-	82
35-39	10	16	33	25	26	-	-	-	-	-	-	110
40-44	8	9	41	38	66	18	-	-	-	-	-	180
45-49	10	7	22	45	82	31	2	-	-	-	-	199
50-54	1	4	23	43	63	51	15	5	-	-	-	205
55-59	1	5	11	27	34	36	4	15	3	-	-	136
60-64	-	1	3	17	15	15	4	4	4	1	-	64
65-69	-	-	2	2	1	-	1	-	-	-	-	6
70+	-	-	-	-	-	-	-	-	-	-	-	-
Total	89	137	183	207	287	151	26	24	7	1	-	1,112

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Line 26a – Schedule of Active Participant Data

The average compensation of **all** active participants, summarized by attained age and years of credited service as of October 1, 2023, is shown below.

Age	Years of Credited Service										Average
	0	1–4	5–9	10–14	15–19	20–24	25–29	30–34	35–39	40+	
0–24	27,936	82,423	-	-	-	-	-	-	-	-	-
25–29	39,198	84,118	*	-	-	-	-	-	-	-	-
30–34	*	89,773	98,725	*	-	-	-	-	-	-	-
35–39	*	*	105,142	97,582	106,552	-	-	-	-	-	-
40–44	*	*	97,933	95,944	107,802	*	-	-	-	-	-
45–49	*	*	97,611	99,057	108,914	103,728	*	-	-	-	-
50–54	*	*	98,182	97,530	105,855	108,534	*	*	-	-	-
55–59	*	*	*	100,735	108,318	98,201	*	*	*	-	-
60–64	-	*	*	*	*	*	*	*	*	*	*
65–69	-	-	*	*	*	-	*	-	-	-	-
70+	-	-	-	-	-	-	-	-	-	-	-
Average											

* Average compensation is not reported for cells with fewer than 20 participants.

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Line 26a – Schedule of Active Participant Data

The average cash balance amount of active participants with account-based benefits, summarized by attained age and years of credited service as of October 1, 2023, is shown below.

Age	Years of Credited Service										Average
	0	1–4	5–9	10–14	15–19	20–24	25–29	30–34	35–39	40+	
0–24	680	5,800	-	-	-	-	-	-	-	-	-
25–29	1,304	6,928	*	-	-	-	-	-	-	-	-
30–34	*	11,010	30,032	-	-	-	-	-	-	-	-
35–39	*	*	39,989	*	-	-	-	-	-	-	-
40–44	*	*	44,887	*	*	-	-	-	-	-	-
45–49	*	*	54,758	-	-	-	-	-	-	-	-
50–54	*	*	59,153	-	*	*	-	-	-	-	-
55–59	*	*	*	-	-	-	-	-	-	-	-
60–64	-	*	*	-	-	-	-	-	-	-	-
65–69	-	-	*	-	-	-	-	-	-	-	-
70+	-	-	-	-	-	-	-	-	-	-	-

* Average cash balance account is not reported for cells with fewer than 20 participants.

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Part V – Statement of Actuarial Assumptions / Methods

Summary of Actuarial Methods

The ultimate or true cost of a pension plan will be equal to the excess of benefits actually paid and the expenses incurred in its administration over investment income earned on monies set aside for its funding. Thus, the ultimate cost of a plan cannot be known until the last payment thereunder has been made to its last participant. The actuarial cost method is a particular technique used by the actuary for establishing the amount and incidence of annual actuarial costs. The actuarial cost method determines the portion of the ultimate cost of a pension plan which should be allocated to each plan year (known as the normal cost). The cost method is thus a budgeting tool which helps to ensure that the pension plan will be adequately and systematically funded.

Actuarial Cost Method

The actuarial cost method used for determining the Plan's ERISA funding requirements and the FASB ASC Topic 960 values is the Unit Credit method. Under this method, an accrued benefit is determined at each active participant's assumed retirement age based on compensation and service at both the beginning and the end of the current year. The Plan's normal cost is the sum of the present value of the excess of each active participant's accrued benefit at the end of the current year over that at the beginning of the current year. The Plan's accrued liability is the sum of (a) the present value of each active participant's accrued benefit at the beginning of the current year plus (b) the present value of each inactive participant's benefits.

Asset Valuation Method

The Actuarial Value of Assets used for determining the Plan's ERISA funding requirements is based on the permitted three-year asset smoothing as defined under IRS Notice 2009-22. Under this method, the Actuarial Value of Assets equals the Market Value of Assets minus one-third and two-thirds, respectively, of the investment gain or loss for each of the two immediately preceding plan years, but it must be within 90% to 110% of the Market Value of Assets. The Market Value of Assets is equal to the Fair Value of Assets as of the valuation date plus the discounted value of employer contributions made after the valuation date. These contributions are discounted to the valuation date using the Effective Interest Rate for the prior plan year. The expected investment return for a plan year is based on the lesser of the expected rate of return on plan assets (currently 6.25%) or the applicable statutory interest rate for the year.

PBGC Variable-Rate Premium Method

The standard method is used for the PBGC variable-rate premium calculation (adopted October 1, 2022).

Amortization Method

For the Plan's ERISA funding requirements, incremental Funding Shortfall amounts are amortized over a fifteen year period, and the related shortfall amortization payment is determined on the first valuation date following the plan year in which it arises based on the segment rates used for ERISA minimum funding purposes on that date, as prescribed under IRC Section 430.

Changes in Actuarial Methods Since Prior Valuation

None.

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Part V – Statement of Actuarial Assumptions / Methods

Summary of Actuarial Assumptions

ECONOMIC ASSUMPTIONS

Interest Rates

The current funding and PBGC interest rates are as follows. The funding interest rates are prescribed under IRS regulations based on the Plan Sponsor's interest rate election. The PBGC interest rates are based on the Plan Sponsor's elected method for determining the premium funding target.

	Minimum Funding	Maximum Deductible	PBGC Premium
Segment 1 (0–5 years)	4.75%	3.03%	5.58%
Segment 2 (5–20 years)	5.00%	4.11%	5.66%
Segment 3 (20+ years)	5.74%	4.27%	5.56%
Effective Interest Rate	5.47%	4.21%	5.59%

ERISA minimum funding: 24-month average segment rates, using a four-month lookback period, adjusted to reflect the applicable segment rate stabilization corridor. Lump sums are calculated using the underlying liability interest rates shown above.

Maximum Deductible Contribution: 24-month average segment rates, using a four-month lookback period, but not adjusted to reflect segment rate stabilization. Lump sums are calculated using the underlying liability interest rates shown above.

PBGC premium: Spot segment rates for the month preceding the valuation, not adjusted to reflect segment rate stabilization. The standard method is used for the PBGC variable rate premium calculation.

FASB ASC Topic 960: 6.25% per year (adopted October 1, 2020). It is based on the Plan's investment policy, including target asset allocation, and Milliman's capital market expectations. Lump sums are calculated using the applicable 417(e) rates for the current plan year (4.91%/ 5.15%/ 5.34%).

Asset Return

ERISA minimum funding and Maximum Deductible Contribution: 6.25% per year (adopted October 1, 2020). It is based on the Plan's investment policy, including target asset allocation, and Milliman's capital market expectations.

DEMOGRAPHIC ASSUMPTIONS

Except where noted, all demographic assumptions are based on the actuary's judgment and continual review of experience.

Mortality Rates

ERISA minimum funding, Maximum Deductible Contribution, and PBGC premium: Effective October 1, 2023, mortality was updated as prescribed by IRC Section 430(h)(3)(A). The mortality assumption was updated to comply with IRS and PBGC requirements. Lump sums are calculated using the 417(e) unisex mortality.

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Part V – Statement of Actuarial Assumptions / Methods

FASB ASC Topic 960: Pri-2012 Total Dataset Mortality table (Employee, Annuitant, Disabled, and Survivor) with Projection Scale MP-2021, applied generationally. As a generational table, it reflects mortality improvements both before and after the measurement date. Lump sums are calculated using the 417(e) unisex mortality.

Turnover

Age	Annual Rate of Withdrawal
25	4%
30	4%
35	4%
40	3%
45	3%
50	2%
55	0%

Disability

None assumed.

Retirement Rates

Active participants are assumed to retire in accordance with the following schedule:

Attained Age	Annual Rate of Retirement
55-61	5%
62-64	25%
65	35%
66-69	25%
70	100%

For active participants between ages 57 and 61 with 30 or more years of service, the assumed rate is increased by 5%.

Terminated vested participants are assumed to retire at age 65.

Salary Increases

3.5% per year.

Form of Payment

90% of active participants are assumed to elect a lump sum when they terminate employment. Of the active participants electing an annuity, 90% of the married population are assumed to elect a 50% joint and survivor annuity and 10% are assumed to elect a single life annuity. Participants who are already terminated and eligible for a deferred monthly benefit are assumed to elect a monthly benefit at their unreduced retirement age.

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Part V – Statement of Actuarial Assumptions / Methods

Lump Sum Factors

FASB ASC Topic 960: 2023 417(e) mortality table and 4.91% / 5.15% / 5.34%.

ERISA minimum funding, maximum deductible contribution, and PBGC premium: 2023 417(e) mortality table and underlying interest rates listed above.

Marriage Rates

For participants not in pay status: 75% of participants not in pay status are assumed to be married, with males 3 years older than females.

For participants in pay status: Actual birth dates of spouses are included in the census data, where relevant.

Expenses

Expected expenses payable from the trust are explicitly loaded to the normal cost. The loading for expenses is \$1,770,000 which is equal to the prior year expenses plus the current year PBGC premium, rounded to the nearest 10,000 (assumed to be payable beginning of year).

Benefits Not Valued

All benefits are valued.

Special Data Adjustments

None.

CHANGES IN ASSUMPTIONS SINCE PRIOR VALUATION

Interest rates for ERISA minimum funding: Effective October 1, 2023, the interest rates used to determine the minimum funding requirements were updated based on the applicable 24-month average segment rates with a four-month lookback from the valuation date, adjusted to reflect the applicable segment rate stabilization corridor. The interest rates were updated to comply with IRS requirements.

Interest rates for Maximum Deductible Contribution: Effective October 1, 2023, the interest rates used for maximum deductible purposes were updated as noted above, but not adjusted to reflect segment rate stabilization. The interest rates were updated to comply with IRS requirements.

Interest rates for PBGC premiums: Effective October 1, 2023, the interest rates used for PBGC variable rate premium purposes were updated to the applicable spot segment rates, not adjusted to reflect segment rate stabilization. The interest rates were updated to comply with PBGC requirements.

Mortality for ERISA minimum funding, Maximum Deductible Contribution, and PBGC premium: Effective October 1, 2023, mortality was updated as prescribed by IRC Section 430(h)(3)(A). The mortality assumption was updated to comply with IRS and PBGC requirements. Lump sums are calculated using the 417(e) unisex mortality.

Lump Sum Factors: Effective October 1, 2023 the interest rates and mortality used for lump sum calculation purposes were updated based on the rates used for ERISA minimum funding, maximum deductible, and PBGC as applicable and 417(e) mortality. For ASC Topic 960, the rates were updated to the actual rates for the 2023-2024 plan year. This was updated from the actual rates for the 2022-2023 plan year.

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Part V – Statement of Actuarial Assumptions / Methods

Expenses: Effective October 1, 2023, expenses were updated to the prior year expenses paid from the trust plus the current year PBGC premium, rounded to the nearest 10,000.

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 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

2023

This Form is Open to Public Inspection

Part I Annual Report Identification Information

For calendar plan year 2023 or fiscal plan year beginning 10/01/2023 and ending 09/30/2024

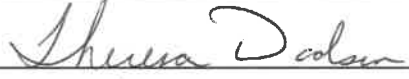
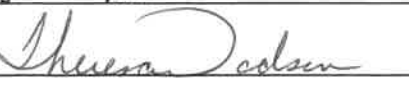
- A** This return/report is for: a multiemployer plan a multiple-employer plan (Filers checking this box must provide participating employer information in accordance with the form instructions.)
- a single-employer plan a DFE (specify) _____
- B** This return/report is: the first return/report the final 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.
- D** Check box if filing under: Form 5558 automatic extension the DFVC program
- special extension (enter description)
- E** If this is a retroactively adopted plan permitted by SECURE Act section 201, check here.

Part II Basic Plan Information—enter all requested information

1a Name of plan EVERGY, INC. JOINT TRUSTEED RETIREMENT PLAN	1b Three-digit plan number (PN) ▶ 002
	1c Effective date of plan 10/01/1931
2a Plan sponsor's name (employer, if for a single-employer plan) Mailing address (include room, apt., suite no. and street, or P.O. Box) City or town, state or province, country, and ZIP or foreign postal code (if foreign, see instructions) Energry, Inc. P. O. Box 418679 Kansas City MO 64141-9679 .	2b Employer Identification Number (EIN) 82-2733395
	2c Plan Sponsor's telephone number 816-556-2200
	2d Business code (see instructions) 221100

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		7/10/25	Theresa Dodson, Director, Benefits
	Signature of plan administrator	Date	Enter name of individual signing as plan administrator
SIGN HERE		7/10/25	Theresa Dodson, Director, Benefits
	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

For Paperwork Reduction Act Notice, see the Instructions for Form 5500.

Form 5500 (2023)
v. 2300728

3a Plan administrator's name and address <input type="checkbox"/> Same as Plan Sponsor EVERGY, INC. JOINT BOARD OF TRUSTEES P.O. BOX 418679 KANSAS CITY MO 64141-9679	3b Administrator's EIN 82-2733395 3c Administrator's telephone number 816-556-2200
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4 If the name and/or EIN of the plan sponsor or the plan name has changed since the last return/report filed for this plan, enter the plan sponsor's name, EIN, the plan name and the plan number from the last return/report: a Sponsor's name c Plan Name	4b EIN 4d PN
--	-----------------------------------

5 Total number of participants at the beginning of the plan year	5	2,060
6 Number of participants as of the end of the plan year unless otherwise stated (welfare plans complete only lines 6a(1), 6a(2), 6b, 6c, and 6d).		
a(1) Total number of active participants at the beginning of the plan year	6a(1)	1,112
a(2) Total number of active participants at the end of the plan year	6a(2)	1,181
b Retired or separated participants receiving benefits	6b	348
c Other retired or separated participants entitled to future benefits	6c	402
d Subtotal. Add lines 6a(2), 6b, and 6c.....	6d	1,931
e Deceased participants whose beneficiaries are receiving or are entitled to receive benefits	6e	159
f Total. Add lines 6d and 6e.....	6f	2,090
g(1) Number of participants with account balances as of the beginning of the plan year (only defined contribution plans complete this item).....	6g(1)	
g(2) Number of participants with account balances as of the end of the plan year (only defined contribution plans complete this item).....	6g(2)	
h Number of participants who terminated employment during the plan year with accrued benefits that were less than 100% vested.....	6h	3

7 Enter the total number of employers obligated to contribute to the plan (only multiemployer plans complete this item)	7	
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8a If the plan provides pension benefits, enter the applicable pension feature codes from the List of Plan Characteristics Codes in the instructions:
 1A 1C 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) <input type="checkbox"/> Insurance (2) <input type="checkbox"/> Code section 412(e)(3) insurance contracts (3) <input checked="" type="checkbox"/> Trust (4) <input type="checkbox"/> General assets of the sponsor	9b Plan benefit arrangement (check all that apply) (1) <input type="checkbox"/> Insurance (2) <input type="checkbox"/> Code section 412(e)(3) insurance contracts (3) <input checked="" type="checkbox"/> Trust (4) <input type="checkbox"/> General assets of the sponsor
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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) <input checked="" type="checkbox"/> R (Retirement Plan Information) (2) <input type="checkbox"/> MB (Multiemployer Defined Benefit Plan and Certain Money Purchase Plan Actuarial Information) - signed by the plan actuary (3) <input checked="" type="checkbox"/> SB (Single-Employer Defined Benefit Plan Actuarial Information) - signed by the plan actuary (4) <input type="checkbox"/> DCG (Individual Plan Information) – Number Attached _____ (5) <input type="checkbox"/> MEP (Multiple-Employer Retirement Plan Information)	b General Schedules (1) <input checked="" type="checkbox"/> H (Financial Information) (2) <input type="checkbox"/> I (Financial Information – Small Plan) (3) <input type="checkbox"/> A (Insurance Information) – Number Attached _____ (4) <input checked="" type="checkbox"/> C (Service Provider Information) (5) <input checked="" type="checkbox"/> D (DFE/Participating Plan Information) (6) <input type="checkbox"/> G (Financial Transaction Schedules)
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Part III Form M-1 Compliance Information (to be completed by welfare benefit plans)

11a If the plan provides welfare benefits, was the plan subject to the Form M-1 filing requirements during the plan year? (See instructions and 29 CFR 2520.101-2.) Yes No

If "Yes" is checked, complete lines 11b and 11c.

11b Is the plan currently in compliance with the Form M-1 filing requirements? (See instructions and 29 CFR 2520.101-2.) Yes No

11c Enter the Receipt Confirmation Code for the 2023 Form M-1 annual report. If the plan was not required to file the 2023 Form M-1 annual report, enter the Receipt Confirmation Code for the most recent Form M-1 that was required to be filed under the Form M-1 filing requirements. (Failure to enter a valid Receipt Confirmation Code will subject the Form 5500 filing to rejection as incomplete.)

Receipt Confirmation Code _____

EVERGY, INC.

JOINT TRUSTEED RETIREMENT PLAN

EIN No. 82-2733395, Plan No. 002

FORM 5500, SCHEDULE H, PART IV, LINE 4j — SCHEDULE OF REPORTABLE TRANSACTIONS
FOR THE YEAR ENDED SEPTEMBER 30, 2024

(a) Identity of Party Involved	(b) Description of Asset	(c) Purchase Price	(d) Selling Price	(e) Cost of Asset	(f) Current Value of Asset on Transaction Date	(g) Net Gain/ (Loss)
SINGLE TRANSACTIONS						
NO ACTIVITY FOR THIS PERIOD						
SERIES TRANSACTIONS						
Goldman Sachs Financial Square Financial Square Tr Government	Money Market Fund (249 Purchases) (128 Sales)	\$ 57,796,696	\$ 58,211,478	\$ 57,796,696 58,211,478	\$ 57,796,696 58,211,478	\$ - -

* Represents a party-in-interest to the Plan.

See accompanying Independent Auditors' Report.

**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

2023

This Form is Open to Public Inspection

For calendar plan year 2023 or fiscal plan year beginning 10/01/2023 and ending 09/30/2024

▶ **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 Everyy, Inc. Joint Trusteed Retirement Plan	B Three-digit plan number (PN) ▶	002
C Plan sponsor's name as shown on line 2a of Form 5500 or 5500-SF Everyy, Inc.	D Employer Identification Number (EIN) 82-2733395	
E Type of plan: <input checked="" type="checkbox"/> Single <input type="checkbox"/> Multiple-A <input type="checkbox"/> Multiple-B		
F Prior year plan size: <input type="checkbox"/> 100 or fewer <input type="checkbox"/> 101-500 <input checked="" type="checkbox"/> More than 500		

Part I Basic Information			
1 Enter the valuation date: Month <u>10</u> Day <u>1</u> Year <u>2023</u>			
2 Assets:			
a Market value	2a	170,861,119	
b Actuarial value	2b	181,503,620	
3 Funding target/participant count breakdown			
	(1) Number of participants	(2) Vested Funding Target	(3) Total Funding Target
a For retired participants and beneficiaries receiving payment.....	531	43,617,854	43,617,854
b For terminated vested participants.....	417	22,643,387	22,643,387
c For active participants	1,112	133,073,857	139,108,988
d Total.....	2,060	199,335,098	205,370,229
4 If the plan is in at-risk status, check the box and complete lines (a) and (b)..... <input type="checkbox"/>			
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	5.47 %	
6 Target normal cost.....			
a Present value of current plan year accruals.....	6a	13,330,411	
b Expected plan-related expenses	6b	1,770,000	
c Target normal cost	6c	15,100,411	

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	John M. Chmielewski <i>JMC</i> Signature of actuary	06/19/2025 Date
	John M. Chmielewski Type or print name of actuary	23-07661 Most recent enrollment number
	Milliman, Inc. Firm name	(262) 796-3379 Telephone number (including area code)
	17335 Golf Parkway, Suite 100 Brookfield WI 53045-6043 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 and Prefunding Balances	
	(a) Carryover balance	(b) Prefunding balance
7 Balance at beginning of prior year after applicable adjustments (line 13 from prior year)	208,433	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)	208,433	0
10 Interest on line 9 using prior year's actual return of <u>10.04%</u>	20,927	0
11 Prior year's excess contributions to be added to prefunding balance:		
a Present value of excess contributions (line 38a from prior year)		7,883,496
b(1) Interest on the excess, if any, of line 38a over line 38b from prior year Schedule SB, using prior year's effective interest rate of <u>5.62%</u>		443,052
b(2) Interest on line 38b from prior year Schedule SB, using prior year's actual return		0
c Total available at beginning of current plan year to add to prefunding balance		8,326,548
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)	229,360	0

Part III	Funding Percentages	
14 Funding target attainment percentage.....	14	88.26%
15 Adjusted funding target attainment percentage	15	88.26%
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	108.44%
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
01/10/2024	8,470		09/05/2024	1,254	
02/27/2024	14,000		09/05/2024	15,177	
02/27/2024	8,890		09/05/2024	9,032	
04/23/2024	8,925		10/28/2024	29,500	
04/23/2024	9,170		10/28/2024	9,222	
06/10/2024	9,171		12/18/2024	17,115,000	
			Totals ▶	18(b)	18(c)
				18,492,811	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	17,308,468
20 Quarterly contributions and liquidity shortfalls:		
a Did the plan have a "funding shortfall" for the prior year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If line 20a is "Yes," were required quarterly installments for the current year made in a timely manner?..... <input type="checkbox"/> Yes <input type="checkbox"/> 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		

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

21 Discount rate:				
a Segment rates:	1st segment: 4.75 %	2nd segment: 5.00 %	3rd segment: 5.74 %	<input type="checkbox"/> 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)	<input type="checkbox"/> Prescribed - combined	<input checked="" type="checkbox"/> Prescribed - separate	<input type="checkbox"/> 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.....	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
25 Has a method change been made for the current plan year? If "Yes," see instructions regarding required attachment.....	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
26 Demographic and benefit information		
a Is the plan required to provide a Schedule of Active Participants? If "Yes," see instructions regarding required attachment.	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No
b Is the plan required to provide a projection of expected benefit payments? If "Yes," see instructions regarding required attachment ...	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> 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 6c)	31a	15,100,411	
b Excess assets, if applicable, but not greater than line 31a	31b	0	
32 Amortization installments:	Outstanding Balance	Installment	
a Net shortfall amortization installment	24,095,969	2,206,726	
b Waiver amortization installment.....			
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		
34 Total funding requirement before reflecting carryover/prefunding balances (lines 31a - 31b + 32a + 32b - 33)....	34	17,307,137	
	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	17,307,137	
37 Contributions allocated toward minimum required contribution for current year adjusted to valuation date (line 19c)	37	17,308,468	
38 Present value of excess contributions for current year (see instructions)			
a Total (excess, if any, of line 37 over line 36)	38a	1,331	
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 the American Rescue Plan Act of 2021 (See Instructions)

41 If an election was made to use the extended amortization rule for a plan year beginning on or before December 31, 2021, check the box to indicate the first plan year for which the rule applies. <input type="checkbox"/> 2019 <input type="checkbox"/> 2020 <input checked="" type="checkbox"/> 2021
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Evergy, Inc. Joint Trusteed Retirement Plan
EIN/PN: 82-2733395/002
Attachment to 2023 Form 5500
Schedule SB, Line 19 - Discounted Employer Contributions

Line 19a. - Contribution Allocated Toward Unpaid Minimum Required Contribution from Prior Plan Years

None

Line 19b. - Contributions Made To Avoid Benefit Restrictions

None

Line 19c. - Contributions Allocated Toward Minimum Required Contribution for Current Year

Date	Plan Year to Apply Contribution	Effective Interest Rate	Late Quarterly Interest Rate	Contribution Amount	Discounted Value as of 10/1/2023
1/10/2024	2023-2024	5.47%		\$ 8,470	\$ 8,346
2/27/2024	2023-2024	5.47%		14,000	13,700
2/27/2024	2023-2024	5.47%		8,890	8,699
4/23/2024	2023-2024	5.47%		8,925	8,663
4/23/2024	2023-2024	5.47%		9,170	8,901
6/10/2024	2023-2024	5.47%		9,171	8,840
9/5/2024	2023-2024	5.47%		1,254	1,193
9/5/2024	2023-2024	5.47%		15,177	14,444
9/5/2024	2023-2024	5.47%		9,032	8,596
10/28/2024	2023-2024	5.47%		29,500	27,860
10/28/2024	2023-2024	5.47%		9,222	8,709
12/18/2024	2023-2024	5.47%		17,115,000	16,043,730
6/11/2025	2023-2024	5.47%		1,255,000	1,146,787
Total				18,492,811	17,308,468

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002

2023 Schedule SB, Line 22 – Description of Weighted Average Retirement Age

The weighted average retirement age for active participants is 63. This equals the sum, over all retirement ages of the current active participants, of the retirement age multiplied by the probability of retiring at that age, as shown in the following table.

<u>Age</u>	<u>Lx</u>	<u>Dx</u>	<u>Retirement Rate</u>
55	1,000.00	50.00	5%
56	950.00	47.50	5%
57	902.50	45.13	5%
58	857.37	42.87	5%
59	814.50	40.73	5%
60	773.77	38.69	5%
61	735.77	36.75	5%
62	698.33	174.58	25%
63	523.75	130.94	25%
64	392.81	98.20	25%
65	294.61	103.11	35%
66	191.50	47.88	25%
67	143.62	35.91	25%
68	107.71	26.93	25%
69	80.78	20.20	25%
70	60.58	60.58	100%
Average			63.00

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002

Schedule SB, Line 26b – Schedule of Projection of Expected Benefit Payments

The following table provides the projected benefit payments underlying the Funding Target using Standard Assumptions in each of the next fifty years starting with the current plan year of this filing assuming (1) no additional accruals, (2) experience (e.g., termination, mortality, and retirement) is in line with valuation assumptions, and (3) no new entrants are covered by the plan.

Plan Year	Active Participants	Terminated Vested Participants	Retired Participants and Beneficiaries Receiving Payments	Total
2023	6,743,373	806,666	5,183,107	12,733,146
2024	7,451,251	482,864	4,919,503	12,853,618
2025	8,323,058	366,133	4,654,322	13,343,513
2026	9,248,556	280,963	4,388,846	13,918,365
2027	9,796,609	1,282,345	4,121,851	15,200,805
2028	10,114,586	1,389,391	3,856,323	15,360,300
2029	10,306,620	1,478,053	3,597,917	15,382,590
2030	10,872,678	879,457	3,346,391	15,098,526
2031	11,644,973	1,285,462	3,103,883	16,034,318
2032	11,656,946	1,467,414	2,871,652	15,996,012
2033	11,759,047	1,512,988	2,649,602	15,921,637
2034	11,671,643	2,215,326	2,438,287	16,325,256
2035	11,507,851	1,265,432	2,237,958	15,011,241
2036	11,176,296	2,340,770	2,048,603	15,565,669
2037	10,239,289	1,882,267	1,869,997	13,991,553
2038	9,828,519	1,776,239	1,701,763	13,306,521
2039	9,506,475	2,040,037	1,543,470	13,089,982
2040	9,161,035	1,589,805	1,394,679	12,145,519
2041	8,156,602	2,714,844	1,254,977	12,126,423
2042	7,491,434	1,249,908	1,123,998	9,865,340
2043	6,823,523	2,277,155	1,001,426	10,102,104
2044	6,141,410	1,864,463	887,031	8,892,904
2045	5,462,199	2,209,217	780,661	8,452,077
2046	4,898,105	2,849,895	682,247	8,430,247
2047	4,413,764	1,993,125	591,752	6,998,641
2048	3,872,174	1,897,138	509,145	6,278,457
2049	3,378,204	2,097,129	434,360	5,909,693
2050	3,100,912	1,387,700	367,259	4,855,871
2051	2,740,604	1,150,926	307,636	4,199,166
2052	2,415,269	591,075	255,200	3,261,544

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002

Schedule SB, Line 26b – Schedule of Projection of Expected Benefit Payments

Plan Year	Active Participants	Terminated Vested Participants	Retired Participants and Beneficiaries Receiving Payments	Total
2053	2,220,845	769,085	209,586	3,199,516
2054	2,031,597	861,722	170,374	3,063,693
2055	1,895,886	461,230	137,092	2,494,208
2056	1,658,940	527,423	109,213	2,295,576
2057	1,527,825	504,349	86,167	2,118,341
2058	1,432,561	566,316	67,370	2,066,247
2059	1,341,234	440,989	52,246	1,834,469
2060	1,236,842	542,895	40,237	1,819,974
2061	1,116,988	394,950	30,822	1,542,760
2062	1,018,712	324,233	23,531	1,366,476
2063	941,476	253,501	17,950	1,212,927
2064	866,299	193,315	13,724	1,073,338
2065	780,208	179,347	10,554	970,109
2066	712,203	165,513	8,196	885,912
2067	640,726	151,907	6,449	799,082
2068	573,546	138,625	5,157	717,328
2069	509,779	125,754	4,199	639,732
2070	455,802	113,377	3,485	572,664
2071	404,688	101,566	2,948	509,202
2072	358,239	90,380	2,537	451,156

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Part V – Summary of Plan Provisions

Summary of Principal Plan Provisions

This summary of plan provisions is intended to only describe the essential features of the Plan. All eligibility requirements and benefit amounts shall be determined in strict accordance with the plan document itself.

Effective Date

October 1, 1972.

Plan Year

October 1 to September 30.

Participation

Employees in Local Union Nos. 412, 1464, and 1613, International Brotherhood of Electrical Workers (AFL-CIO) who have six months or more of employment.

Definitions

Final Average Salary

The highest average monthly salary for the number of consecutive years specified below, based on the age at date of retirement or termination, if earlier:

Age	Number of Years in Average Compensation
Less than 62	5
62-64	4
65+	3

However, for members who have at least 30 years of Credited Service and have attained age 57, three years will be used in the calculation of Average Compensation.

Credited Service

Equal to the sum of:

- Years of Service earned prior to July 1, 1972.
- $\frac{1}{4}$ of a year if at least one hour of service was performed between July 1, 1972 and September 30, 1972.
- Plan years after October 1, 1972 in which 1,000 hours of service were earned plus plan years after October 1, 1972 in which at least 500 hours of service but less than 1,000 hours of service were earned, times 0.5.

Pension Start Date

For an annuity, the first day of the first period with respect to which an amount is payable. For a lump sum, the date of the payment.

Early Retirement Date

Age 55.

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Part V – Summary of Plan Provisions

Annual Salary

Base compensation, computed on an annual basis by multiplying the employee's hourly rate of pay as of each October 1 by 2,088.

Monthly Salary

Annual Salary divided by 12.

Normal Retirement Date

Age 65.

Cash-Balance Employee

Employee hired or rehired on or after October 1, 2013.

Pay Credits

For a Cash-Balance Employee with 1,000 or more hours of service in a Plan Year, actual salary multiplied by the following contribution rate:

Age as of the end of the Plan Year	Contribution Rate
Less than 30	4%
30 – 34	5%
35 – 39	6%
40 – 44	7%
45 – 49	8%
50 – 54	9%
55 – 59	10%
60 or more	12%

Interest Credits

5% annual rate of interest, applied to the amount in the Cash-Balance account as of the end of the prior Plan Year. This rate shall not exceed a market rate of return as determined under IRS regulations.

Actuarial Equivalence

Equivalence in value of the aggregate amounts expected to be received under different forms of payment based on the "applicable interest rate" as determined under IRC 417(e)(3) and published by the IRS for the month of May that next precedes the Plan Year in which the Pension Starting Date occurs and the applicable 417(e)(3) mortality table determined as of the first day of the Plan Year in which the Pension Starting Date occurs.

Traditional Pension Benefits**Normal Retirement**

Monthly annuity equal to 1 2/3% of Final Average Salary times years of Credited Service, not to exceed 30 years.

Early Retirement

Monthly annuity equal to the accrued benefit as of the early retirement date reduced by 0.25% for each month that

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Part V – Summary of Plan Provisions

the benefit commencement date precedes age 62. If the participant has 30 or more years of Credited Service, the 0.25% reduction will only be made for months between the benefit commencement date and age 57.

Preretirement Spouse Benefits

If a vested active participant dies prior to attaining age 55, the participant's spouse will receive a monthly benefit beginning on the date the participant would have attained age 55. The monthly benefit is equal to 50% of the accrued benefit reduced for early retirement and to reflect payment in the form of joint and 50% survivor annuity.

If a vested active participant dies after attaining age 55, the participant's spouse will receive an immediate monthly spouse benefit. The surviving spouse benefit is equal to 50% of the accrued benefit reduced for early retirement and to reflect payment in the form of a joint and 50% survivor annuity.

Termination Benefit

Benefit upon termination equal to a vested interest in the accrued benefit as of the date of termination, determined according to the following schedule:

Completed Years of Eligibility Service	Vesting %
Less than 5	0%
5 or More	100%

Cash-Balance Benefits

Normal Retirement

The Actuarial Equivalence of the Cash-Balance account as of the Pension Starting Date.

Early Retirement

The Actuarial Equivalence of the Cash-Balance account as of the Pension Starting Date.

Preretirement Spouse Benefits

The Actuarial Equivalence of the vested Cash-Balance account as of the Pension Starting Date.

Termination Benefit

The Actuarial Equivalence of the vested Cash-Balance account as of the Pension Starting Date, determined according to the following vesting schedule:

Completed Years of Eligibility Service	Vesting %
Less than 3	0%
3 or More	100%

Forms of Annuity

Normal

Life only annuity.

Optional

Joint and survivor annuity, period certain and life annuity, or lump sum.

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Part V – Summary of Plan Provisions

Contributions

Participant

None.

Employer

An amount necessary to provide the benefits under the plan based upon the recommendations of periodic actuarial valuations.

CHANGES IN PLAN PROVISIONS SINCE PRIOR VALUATION

None.

SUPPLEMENTAL SCHEDULES

EVERGY, INC.
JOINT TRUSTED RETIREMENT PLAN
EIN No. 82-2733395, Plan No. 002

FORM 5500, SCHEDULE H, PART IV, LINE 4i — SCHEDULE OF ASSETS (HELD AT END OF YEAR)
AS OF SEPTEMBER 30, 2024

(a)	(b) Identity of Issue, Borrower, Lessor, or Similar Party	(c) Description of Investment Including Maturity Date, Rate of Interest	Collateral, Par, or Maturity Value	(d) Cost	(e) Current Value
Mutual funds					
*	SEI INSTITUTIONAL INVESTMENT TRUST	EXTENDED MARKET INDEX FUND A	Mutual funds (265,594 shares)	\$ 4,165,414	\$ 5,038,325
*	SEI INSTITUTIONAL INVESTMENT TRUST	LARGE CAP DISCIPLINED EQUITY FUND-A	Mutual funds (1,363,543 shares)	12,207,471	16,839,759
*	SEI INSTITUTIONAL INVESTMENT TRUST	S&P 500 INDEX FUND A	Mutual funds (693,812 shares)	12,214,434	16,873,507
*	SEI INSTITUTIONAL INVESTMENT TRUST	SMALL MID CAP EQUITY FUND-A	Mutual funds (450,994 shares)	4,297,427	4,983,482
*	SEI INSTITUTIONAL INVESTMENT TRUST	WORLD EQUITY EX US FUND-A	Mutual funds (2,667,679 shares)	25,605,895	35,826,931
*	SEI INSTITUTIONAL INVESTMENT TRUST	DYNAMIC ASSET ALLOCATION FUND A	Mutual funds (365,301 shares)	6,324,859	8,453,054
*	SEI INSTITUTIONAL INVESTMENT TRUST	HIGH YIELD BOND FUND-A	Mutual funds (914,740 shares)	7,111,828	6,595,274
*	SEI INSTITUTIONAL INVESTMENT TRUST	EMERGING MARKETS DEBT FUND-A	Mutual funds (747,300 shares)	6,732,228	6,740,648
Total mutual funds				78,659,556	101,350,980
Bonds					
	ABBVIE INC	SENIOR NOTE 5.35% DUE 03/15/44 DATED 02/26/24 CALLABLE 09/15/43	Bonds (\$120,000 par value)	119,834	126,583
	ABFS MORTGAGE LOAN TRUST	SERIES 2001-2 CLASS A4 VARIABLE RATE DUE 12/25/31 DATED 6/1/01	Bonds (\$1,571 par value)	1,672	1,397
	ALABAMA POWER CO	SENIOR UNSECURED NOTE 4.15% DUE 08/15/44 DATED 08/26/14 CALLABLE 02/15/44	Bonds (\$225,000 par value)	223,209	196,765
	ALLSTATE CORP	SENIOR UNSECURED NOTE 4.5% DUE 06/15/43 DATED 06/07/13	Bonds (\$310,000 par value)	301,112	285,659
	ALLY AUTO RECEIVABLES TRUST	SERIES 2022-2 CLASS A3 4.76% DUE 05/17/27 DATED 10/12/22	Bonds (\$193,021 par value)	193,019	193,081
	AMERICA MOVIL SAB DE CV	SENIOR UNSECURED NOTE 3.625% DUE 04/22/29 DATED 04/22/19 CALLABLE 01/22/29	Bonds (\$200,000 par value)	198,656	193,816
	AMERICAN FINANCIAL GROUP	SENIOR UNSECURED NOTE 4.5% DUE 06/15/47 DATED 06/02/17 CALLABLE 12/15/46	Bonds (\$60,000 par value)	49,462	53,382
	AMERICAN TOWER TRUST I	FIRST LIEN NOTE 3.652% DUE 03/15/48 DATED 03/29/18	Bonds (\$250,000 par value)	250,000	242,862
	ANHEUSER-BUSCH INBEV WORLDWIDE INC	SENIOR UNSECURED NOTE 4.439% DUE 10/06/48 DATED 04/06/17 CALLABLE 04/06/48	Bonds (\$120,000 par value)	120,985	111,056
	AON NORTH AMERICA INC	SENIOR UNSECURED NOTE 5.75% DUE 03/01/54 DATED 03/01/24 CALLABLE 09/01/53	Bonds (\$70,000 par value)	69,574	74,154
	ARCH CAPITAL GROUP LIMITED	SENIOR UNSECURED NOTE 7.35% DUE 05/01/34 DATED 05/04/04	Bonds (\$130,000 par value)	175,395	154,177
	ARGENT SECURITIES INC	SERIES 2004-W10 CLASS A2 VARIABLE RATE DUE 10/25/34 DATED 9/9/04	Bonds (\$35,285 par value)	34,226	34,258
	AT&T INC	SENIOR UNSECURED NOTE 5.4% DUE 02/15/34 DATED 06/02/23 CALLABLE 11/15/33	Bonds (\$55,000 par value)	54,819	57,710
	AVALONBAY COMMUNITIES	SENIOR UNSECURED NOTE 5% DUE 02/15/33 DATED 12/07/22 CALLABLE 11/15/32	Bonds (\$220,000 par value)	218,104	224,963
	AVIS BUDGET RENTAL CAR FUNDING LLC	AESOP SERIES 2020-1A CLASS A 2.33% DUE 08/20/26 DATED 01/29/20	Bonds (\$350,000 par value)	349,884	344,186
	BAKER HUGHES HOLDINGS LLC	SENIOR UNSECURED NOTE 3.337% DUE 12/15/27 DATED 12/11/17 CALLABLE 09/15/27	Bonds (\$200,000 par value)	199,174	195,178
	BAKER HUGHES HOLDINGS LLC	SENIOR UNSECURED NOTE 4.08% DUE 12/15/47 DATED 12/11/17 CALLABLE 06/15/47	Bonds (\$250,000 par value)	250,940	212,275
	BANK OF AMERICA CORP	SENIOR UNSECURED NOTE VARIABLE RATE DUE 03/20/51 DATED 03/20/20 CALLABLE 03/20/50	Bonds (\$280,000 par value)	224,020	243,244
	BANK OF AMERICA NA	SUBORDINATED NOTE 6% DUE 10/15/36 DATED 10/26/06	Bonds (\$250,000 par value)	310,602	276,362
	BEAR STEARNS ALT-A TRUST	SERIES 2005-9 CLASS 25A1 VARIABLE RATE DUE 11/25/35 DATED 9/1/05	Bonds (\$36,840 par value)	36,446	24,653
	BEAR STEARNS ALTERNATIVE-A TRUST	SERIES 2006-8 CLASS 3A1 VARIABLE RATE DUE 2/25/34 DATED 12/28/06	Bonds (\$20,380 par value)	18,610	19,186

(Continued)

EVERGY, INC.
JOINT TRUSTED RETIREMENT PLAN
EIN No. 82-2733395, Plan No. 002

FORM 5500, SCHEDULE H, PART IV, LINE 4i — SCHEDULE OF ASSETS (HELD AT END OF YEAR)
AS OF SEPTEMBER 30, 2024

(a)	(b) Identity of Issue, Borrower, Lessor, or Similar Party	(c) Description of Investment Including Maturity Date, Rate of Interest	Collateral, Par, or Maturity Value	(d) Cost	(e) Current Value
	Bonds (continued):				
	BELL CANADA	SENIOR UNSECURED NOTE 4.464% DUE 04/01/48 DATED 03/29/18 CALLABLE 09/29/47	Bonds (\$125,000 par value)	\$ 125,000	\$ 110,856
	BERKSHIRE HATHAWAY ENERGY CO	SENIOR UNSECURED NOTE 3.8% DUE 07/15/48 DATED 01/05/18 CALLABLE 01/15/48	Bonds (\$210,000 par value)	208,272	166,967
	BERKSHIRE HATHAWAY FINANCE	SENIOR UNSECURED NOTE 4.4% DUE 05/15/42 DATED 05/15/12	Bonds (\$170,000 par value)	172,426	166,779
	BHP BILLITON FIN USA LTD	SENIOR UNSECURED NOTE 5% DUE 09/30/43 DATED 09/30/13	Bonds (\$150,000 par value)	145,764	150,446
	BORGWARNER INC	SENIOR UNSECURED NOTE 4.375% DUE 03/15/45 DATED 03/16/15 CALLABLE 09/15/44	Bonds (\$295,000 par value)	311,657	249,771
	BOSTON UNIVERSITY	SENIOR UNSECURED NOTE 5.2% DUE 10/01/45 DATED 08/24/11 SINKABLE	Bonds (\$270,000 par value)	268,739	287,399
	BRISTOL-MYERS SQUIBB CO	SENIOR UNSECURED NOTE 5.7% DUE 10/15/40 DATED 04/15/20	Bonds (\$125,000 par value)	125,000	133,417
	BURLINGTON NORTH SANTA FE	SENIOR UNSECURED NOTE 6.2% DUE 08/15/36 DATED 08/17/06	Bonds (\$240,000 par value)	252,379	274,246
	CANADIAN NATIONAL RAILWAY NOTE	6.2% DUE 06/01/36 DATED 05/31/06	Bonds (\$240,000 par value)	297,610	272,417
	CANADIAN PACIFIC RAILWAY	SENIOR UNSECURED NOTE 4.95% DUE 08/15/45 DATED 04/19/23 CALLABLE 02/15/45	Bonds (\$175,000 par value)	163,956	169,514
	CGI INC	SENIOR UNSECURED NOTE 2.3% DUE 09/14/31 DATED 03/14/22 CALLABLE 06/14/31	Bonds (\$150,000 par value)	149,374	128,565
	CHARLES SCHWAB CORPORATION	SENIOR UNSECURED NOTE VARIABLE RATE DUE 05/19/34 DATED 05/19/23 CALLABLE 05/19/33	Bonds (\$150,000 par value)	153,796	160,618
	CHUBB INA HOLDINGS INC	SENIOR UNSECURED NOTE 4.15% DUE 03/13/43 DATED 03/13/13	Bonds (\$175,000 par value)	158,585	157,798
	CIT GROUP HOME EQUITY LOAN TRUST	SERIES 2002-1 CLASS MV1 VARIABLE RATE DUE 9/25/30 DATED 3/28/02	Bonds (\$9,946 par value)	9,001	9,921
	CITIGROUP INC	SENIOR UNSECURED NOTE VARIABLE RATE DUE 01/25/33 DATED 01/25/22 CALLABLE 01/25/32	Bonds (\$200,000 par value)	200,000	178,634
	CITIGROUP INC	SUBORDINATED NOTE 4.75% DUE 05/18/46 DATED 05/18/16	Bonds (\$125,000 par value)	124,678	117,286
	CITIGROUP MORTGAGE LOAN TRUST INC	SERIES 2004-NCM1 CLASS 1A3 6.75% DUE 07/25/34 DATED 06/01/04	Bonds (\$24,332 par value)	25,427	25,004
	CNA FINANCIAL CORP	SENIOR UNSECURED NOTE 3.45% DUE 08/15/27 DATED 08/10/17 CALLABLE 05/10/27	Bonds (\$210,000 par value)	224,007	205,458
	COLUMBUS SOUTHERN POWER NOTE	5.85% DUE 10/01/35 DATED 10/14/05	Bonds (\$175,000 par value)	174,172	186,788
	COMCAST CORP	SENIOR UNSECURED NOTE 4.7% DUE 10/15/48 DATED 10/05/18 CALLABLE 04/15/48	Bonds (\$180,000 par value)	169,274	170,320
	COMCAST CORP	SENIOR UNSECURED NOTE 5.5% DUE 11/15/32 DATED 11/07/22 CALLABLE 08/15/32	Bonds (\$335,000 par value)	350,175	358,661
	COMMONWEALTH FINANCING AUTHORITY PA	TAXABLE PLANCON PROGRAM SERIES A 3.864% DUE 06/01/38 DATED 01/18/18 SINKABLE	Bonds (\$240,000 par value)	240,000	225,072
	CONOCOPHILLIPS CANADA NOTE	5.95% DUE 10/15/36 DATED 10/13/06	Bonds (\$200,000 par value)	222,162	219,174
	COUNTRYWIDE ALTERNATIVE LOAN TRUST	SERIES 2004-18CB CLASS 3A1 5.25% DUE 09/25/19 DATED 07/01/04	Bonds (\$804 par value)	813	796
	COUNTRYWIDE HOME LOANS	SERIES 2004-2 CLASS 2A1 VARIABLE RATE DUE 2/25/34 DATED 1/1/04	Bonds (\$12,931 par value)	12,414	11,512
	COUNTRYWIDE HOME LOANS	SERIES 2005-6 CLASS 2A1 5.5% DUE 04/25/35 DATED 02/01/05	Bonds (\$14,737 par value)	11,052	12,605
	CREDIT SUISSE MORTGAGE TRUST	SERIES 2013-6 CLASS 1A1 VARIABLE RATE DUE 07/25/28 DATED 07/01/13	Bonds (\$61,857 par value)	62,244	59,341
	CS FIRST BOSTON MORTGAGE SECURITIES	CORP SERIES 2002-30 CLASS 1A1 7.5% DUE 11/25/32 DATED 11/01/02	Bonds (\$1,098 par value)	1,164	1,132

(Continued)

EVERGY, INC.
JOINT TRUSTED RETIREMENT PLAN
EIN No. 82-2733395, Plan No. 002

FORM 5500, SCHEDULE H, PART IV, LINE 4i — SCHEDULE OF ASSETS (HELD AT END OF YEAR)
AS OF SEPTEMBER 30, 2024

(a)	(b) Identity of Issue, Borrower, Lessor, or Similar Party	(c) Description of Investment Including Maturity Date, Rate of Interest	Collateral, Par, or Maturity Value	(d) Cost	(e) Current Value
Bonds (continued):					
	CUMMINS INC	SENIOR GLOBAL NOTE 5.45% DUE 02/20/54 DATED 02/20/24 CALLABLE 08/20/53	Bonds (\$110,000 par value)	\$ 109,308	\$ 116,366
	CUMMINS INC	SENIOR UNSECURED NOTE 1.5% DUE 09/01/30 DATED 08/24/20 CALLABLE 06/01/30	Bonds (\$285,000 par value)	224,492	246,673
	DANAHER CORP	SENIOR UNSECURED NOTE 2.8% DUE 12/10/51 DATED 12/10/21 CALLABLE 06/10/51	Bonds (\$150,000 par value)	97,776	102,831
	DUKE ENERGY OHIO INC	NOTE 5.55% DUE 03/15/54 DATED 03/14/24 CALLABLE 09/15/53	Bonds (\$150,000 par value)	149,608	156,832
	ELFI GRADUATE LOAN PROGRAM 2021-A	LLC SERIES 2021-A CLASS A 1.53% DUE 12/26/46 DATED 10/26/21	Bonds (\$187,404 par value)	169,103	166,811
	ELI LILLY & COMPANY	SENIOR UNSECURED NOTE 4.875% DUE 02/27/53 DATED 02/27/23 CALLABLE 08/27/52	Bonds (\$100,000 par value)	99,937	100,113
	ENERGY TRANSFER OPERATING	SENIOR UNSECURED NOTE 3.75% DUE 05/15/30 DATED 01/22/20 CALLABLE 02/15/30	Bonds (\$170,000 par value)	169,733	162,396
	ENTERGY LOUISIANA LLC	SECURED NOTE 4.2% DUE 04/01/50 DATED 03/12/19 CALLABLE 10/01/49	Bonds (\$100,000 par value)	119,115	84,771
	ENTERPRISE PRODUCTS OPERATING LLC	SENIOR UNSECURED NOTE 2.8% DUE 01/31/30 DATED 01/15/20 CALLABLE 10/31/29	Bonds (\$170,000 par value)	169,866	158,601
	EVEREST REINSURANCE HOLDINGS	SENIOR UNSECURED NOTE 4.868% DUE 06/01/44 DATED 06/05/14	Bonds (\$75,000 par value)	67,253	69,897
	FEDERAL FARM CREDIT BANK	UNSECURED NOTE 3.67% DUE 05/16/28 DATED 05/16/18 CALLABLE 05/16/23	Bonds (\$240,000 par value)	240,000	237,257
	FEDERAL HOME LOAN MORTGAGE CORP	GOLD POOL #G60923 4% DUE 04/01/47 DATED 03/01/17	Bonds (\$25,005 par value)	26,271	24,262
	FEDERAL HOME LOAN MORTGAGE CORP	POOL #781530 VARIABLE RATE DUE 05/01/34 DATED 04/01/04	Bonds (\$2,011 par value)	1,942	2,083
	FEDERAL HOME LOAN MORTGAGE CORP	REMIC SERIES 2024-4929 CLASS PA 2.5% DUE 09/25/49 DATED 08/01/24	Bonds (\$223,688 par value)	191,183	193,072
	FEDERAL HOME LOAN MORTGAGE CORP	REMIC SERIES 2024-5457 CLASS DB 4.75% DUE 08/25/54 DATED 09/01/24	Bonds (\$225,000 par value)	225,668	225,000
	FEDERAL HOME LOAN MORTGAGE CORP	REMIC SERIES 2024-5460 CLASS EB 4.75% DUE 09/25/54 DATED 09/01/24	Bonds (\$225,000 par value)	225,844	225,844
	FEDERAL HOME LOAN MORTGAGE CORP	REMIC SERIES 4666 CLASS PB 3% DUE 08/15/45 DATED 03/01/17	Bonds (\$20,903 par value)	21,102	20,274
	FEDERAL HOME LOAN MORTGAGE CORP	UMBS POOL #QH7648 5.5% DUE 11/25/53 DATED 08/01/24	Bonds (\$138,340 par value)	139,853	140,036
	FEDERAL HOME LOAN MORTGAGE CORP	UMBS POOL #RJ0917 5% DUE 02/01/54 DATED 02/01/24	Bonds (\$214,103 par value)	205,271	214,201
	FEDERAL HOME LOAN MORTGAGE CORP	UMBS POOL #SD2382 3.5% DUE 08/01/52 DATED 02/01/23	Bonds (\$211,277 par value)	193,120	198,957
	FEDERAL HOME LOAN MORTGAGE CORP	UMBS POOL #SD2570 5% DUE 11/25/52 DATED 04/01/24	Bonds (\$243,931 par value)	233,335	244,114
	FEDERAL HOME LOAN MORTGAGE CORP	UMBS POOL #SD3396 5.5% DUE 07/01/53 DATED 07/01/23	Bonds (\$233,697 par value)	232,017	237,824
	FEDERAL NATIONAL MORTGAGE ASSOC	GRANTOR TRUST SERIES 2001-T1 CLASS A1 7.5% DUE 10/25/40 DATED 1/1/01	Bonds (\$12,690 par value)	13,239	12,807
	FEDERAL NATIONAL MORTGAGE ASSOC	POOL #675570 6% DUE 12/01/32 DATED 12/01/02	Bonds (\$1,643 par value)	1,689	1,679
	FEDERAL NATIONAL MORTGAGE ASSOC	POOL #BS6088 4.04% DUE 08/01/30 DATED 07/01/22	Bonds (\$250,000 par value)	236,367	247,728
	FEDERAL NATIONAL MORTGAGE ASSOC	POOL #MA3390 4.5% DUE 06/01/38 DATED 05/01/18	Bonds (\$54,406 par value)	56,930	55,228
	FEDERAL NATIONAL MORTGAGE ASSOC	POOL #MA5312 5% DUE 02/25/44 DATED 02/01/24	Bonds (\$229,024 par value)	224,587	230,939
	FEDERAL NATIONAL MORTGAGE ASSOC	REMIC GRANTOR TRUST SERIES 2002-T18 CLASS A5 VARIABLE RATE DUE 5/25/42 DATED 11/1/02	Bonds (\$9,827 par value)	10,262	9,950

(Continued)

EVERGY, INC.
JOINT TRUSTED RETIREMENT PLAN
EIN No. 82-2733395, Plan No. 002

FORM 5500, SCHEDULE H, PART IV, LINE 4i — SCHEDULE OF ASSETS (HELD AT END OF YEAR)
AS OF SEPTEMBER 30, 2024

(a) Similar Party	(b) Identity of Issue, Borrower, Lessor, or	(c) Description of Investment Including	Maturity Date, Rate of Interest	Collateral, Par, or Maturity Value	(d) Cost	(e) Current Value
Bonds (continued):						
FEDERAL NATIONAL MORTGAGE ASSOC		REMIC GRANTOR TRUST SERIES 2002-T6 CLASS A4 VARIABLE RATE DUE 3/25/41 DATED 3/1/02		Bonds (\$6,739 par value)	\$ 6,946	\$ 6,524
FEDERAL NATIONAL MORTGAGE ASSOC		REMIC SERIES 2002-T16 CLASS A4 VARIABLE RATE DUE 05/25/42 DATED 10/1/02		Bonds (\$11,690 par value)	12,175	11,497
FEDERAL NATIONAL MORTGAGE ASSOC		REMIC SERIES 2003-117 CLASS KB 6% DUE 12/25/33 DATED 11/01/03		Bonds (\$63,448 par value)	66,660	66,547
FEDERAL NATIONAL MORTGAGE ASSOC		REMIC SERIES 2004-37 CLASS AL 4.5% DUE 06/25/34 DATED 05/01/04		Bonds (\$720,000 par value)	736,200	718,454
FEDERAL NATIONAL MORTGAGE ASSOC		REMIC SERIES 2016-16 CLASS PD 3% DUE 12/25/44 DATED 03/01/16		Bonds (\$14,233 par value)	14,258	13,727
FEDERAL NATIONAL MORTGAGE ASSOC		REMIC SERIES 2017-4 CLASS EA 3% DUE 02/25/47 DATED 01/01/17		Bonds (\$48,004 par value)	48,739	46,005
FEDERAL NATIONAL MORTGAGE ASSOC		REMIC SERIES 2017-7 CLASS JA 2% DUE 02/25/47 DATED 01/01/17		Bonds (\$44,085 par value)	42,762	37,363
FEDERAL NATIONAL MORTGAGE ASSOC		REMIC SERIES 2024-73 CLASS PM 4.75% DUE 09/25/54 DATED 09/01/24		Bonds (\$225,000 par value)	225,396	225,000
FEDERAL NATIONAL MORTGAGE ASSOC		UMBS POOL #813174 VARIABLE RATE DUE 2/1/35 DATED 2/1/05		Bonds (\$434 par value)	440	441
FEDERAL NATIONAL MORTGAGE ASSOC		UMBS POOL #816308 VARIABLE RATE DUE 02/01/35 DATED 02/01/05		Bonds (\$4,715 par value)	4,701	4,700
FEDERAL NATIONAL MORTGAGE ASSOC		UMBS POOL #CB6308 4.5% DUE 05/25/53 DATED 04/01/24		Bonds (\$212,656 par value)	200,229	209,243
FEDERAL NATIONAL MORTGAGE ASSOC		UMBS POOL #FS7274 5% DUE 02/25/54 DATED 04/01/24		Bonds (\$191,463 par value)	182,398	191,494
FEDERAL NATIONAL MORTGAGE ASSOC		UMBS POOL #FS8823 3% DUE 03/25/52 DATED 08/01/24		Bonds (\$223,923 par value)	200,621	201,289
FHLMC MULTICLASS CERTIFICATES		REMIC SERIES 2024-5000 CLASS NA 1% DUE 06/25/50 DATED 08/01/24		Bonds (\$222,540 par value)	166,271	167,204
FLAGSTAR MORTGAGE TRUST		SERIES 2018-2 CLASS A4 VARIABLE RATE DUE 4/25/48 DATED 4/1/18		Bonds (\$1,632 par value)	1,608	1,605
GBX LEASING LLC		SERIES 2022-1 CLASS A 2.87% DUE 02/20/52 DATED 02/09/22		Bonds (\$289,580 par value)	289,441	267,736
GENERAL MOTORS CO		SENIOR UNSECURED NOTE 6.6% DUE 04/01/36 DATED 02/23/16 CALLABLE 10/01/35		Bonds (\$170,000 par value)	183,855	183,943
GENERAL MOTORS FINANCIAL COMPANY		SENIOR UNSECURED NOTE 6.1% DUE 01/07/34 DATED 12/07/23 CALLABLE 10/07/33		Bonds (\$130,000 par value)	129,795	135,394
GOLDMAN SACHS GROUP INCORPORATED		SUBORDINATED NOTE 6.75% DUE 10/01/37 DATED 10/03/07		Bonds (\$85,000 par value)	92,294	97,877
GOVERNMENT NATIONAL MORTGAGE ASSOC		POOL #622123 5.5% DUE 10/15/33 DATED 10/01/03		Bonds (\$17,959 par value)	18,607	18,592
GOVERNMENT NATIONAL MORTGAGE ASSOC		REMIC SERIES 2015-167 CLASS KM 3% DUE 12/20/43 DATED 11/01/15		Bonds (\$51,806 par value)	51,717	47,442
GOVERNMENT NATIONAL MORTGAGE ASSOC		REMIC SERIES 2019-29 CLASS MT 3.5% DUE 03/20/49 DATED 03/01/19		Bonds (\$100,715 par value)	101,927	94,015
GSR MORTGAGE LOAN TRUST		SERIES 2004-7 CLASS 1A1 VARIABLE RATE DUE 6/25/34 DATED 6/1/04		Bonds (\$18,251 par value)	17,658	17,762
GUARDIAN LIFE INSURANCE		SUBORDINATED NOTE 4.85% DUE 01/24/77 DATED 01/24/17		Bonds (\$400,000 par value)	431,408	368,352
HALLIBURTON COMPANY		SENIOR UNSECURED NOTE 4.5% DUE 11/15/41 DATED 11/14/11 CALLABLE 05/15/41		Bonds (\$100,000 par value)	99,494	91,930
HERTZ VEHICLE FINANCING LLC		SERIES 2022-2A CLASS A 2.33% DUE 06/26/28 DATED 01/19/22		Bonds (\$350,000 par value)	349,529	329,871
HIGH STREET FUNDING TRUST II		SENIOR UNSECURED NOTE 4.682% DUE 02/15/48 DATED 03/15/18 CALLABLE 11/15/47		Bonds (\$155,000 par value)	197,768	132,723
ILLINOIS TOOL WORKS INC		SENIOR UNSECURED NOTE 3.9% DUE 09/01/42 DATED 08/28/12 CALLABLE 03/01/42		Bonds (\$190,000 par value)	165,199	167,432
IMPAC CMB TRUST		SERIES 2004-4 CLASS 2A2 VARIABLE RATE DUE 9/25/34 DATED 4/1/04		Bonds (\$22,956 par value)	21,880	26,176

(Continued)

EVERGY, INC.
JOINT TRUSTED RETIREMENT PLAN
EIN No. 82-2733395, Plan No. 002

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AS OF SEPTEMBER 30, 2024

(a)	(b) Identity of Issue, Borrower, Lessor, or Similar Party	(c) Description of Investment Including Maturity Date, Rate of Interest	Collateral, Par, or Maturity Value	(d) Cost	(e) Current Value
	Bonds (continued):				
	INDIANAPOLIS POWER AND LIGHT COMPANY	SENIOR SECURED NOTE 5.7% DUE 04/01/54 DATED 03/18/24 CALLABLE 10/01/53	Bonds (\$150,000 par value)	\$ 150,087	\$ 159,750
	INTERNATIONAL PAPER CO	SENIOR UNSECURED NOTE 8.7% DUE 06/15/38 DATED 06/04/08	Bonds (\$70,000 par value)	101,714	89,223
	ITC HOLDINGS CORP	SENIOR UNSECURED NOTE 5.3% DUE 07/01/43 DATED 07/03/13 CALLABLE 01/01/43	Bonds (\$175,000 par value)	197,537	169,879
	J P MORGAN ALTERNATIVE LOAN TRUST	SERIES 2006-A1 CLASS 2A1 VARIABLE RATE DUE 3/25/36 DATED 2/1/06	Bonds (\$2,975 par value)	2,975	2,250
	JACKSON NATIONAL LIFE GLOBAL	SECURED NOTE 5.5% DUE 01/09/26 DATED 01/09/23	Bonds (\$250,000 par value)	249,463	252,500
	JPMORGAN CHASE & CO	SENIOR UNSECURED NOTE VARIABLE RATE DUE 04/22/27 DATED 04/22/21 CALLABLE 04/22/26	Bonds (\$270,000 par value)	271,377	258,652
	JPMORGAN CHASE & CO	SENIOR UNSECURED NOTE VARIABLE RATE DUE 11/19/41 DATED 11/19/20 CALLABLE 11/19/40	Bonds (\$245,000 par value)	245,000	180,776
	KENTUCKY UTILITIES CO	FIRST LIEN NOTE 5.125% DUE 11/01/40 DATED 05/01/11 CALLABLE 05/01/40	Bonds (\$160,000 par value)	152,462	160,624
	KINDER MORGAN ENERGY PARTNERS	SENIOR UNSECURED NOTE 5% DUE 08/15/42 DATED 08/13/12 CALLABLE 02/15/42	Bonds (\$60,000 par value)	55,138	55,891
	KONINKLIJKE PHILIPS NV	SENIOR UNSECURED NOTE 6.875% DUE 03/11/38 DATED 03/11/08	Bonds (\$270,000 par value)	370,937	312,042
	LA HABRA CA PENSION	OBLIGATION TAXABLE 2.316% DUE 08/01/28 DATED 01/26/22	Bonds (\$345,000 par value)	345,000	323,289
	LACLEDE GROUP INC	SENIOR UNSECURED NOTE 4.7% DUE 08/15/44 DATED 08/19/14 CALLABLE 02/15/44	Bonds (\$200,000 par value)	199,810	177,124
	LOCKHEED MARTIN CORP	SENIOR UNSECURED NOTE 4.09% DUE 09/15/52 DATED 09/07/17 CALLABLE 03/15/52	Bonds (\$136,000 par value)	141,371	118,781
	LOEWS CORP	SENIOR UNSECURED NOTE 4.125% DUE 05/15/43 DATED 05/07/13 CALLABLE 11/15/42	Bonds (\$190,000 par value)	211,808	168,260
	LONG BEACH MORTGAGE LOAN TRUST	SERIES 2003-4 CLASS AV1 VARIABLE RATE DUE 8/25/33 DATED 7/10/33	Bonds (\$59,090 par value)	54,326	58,329
	LOS ANGELES CA COMMUNITY COLLEGE MASTER ASSET BACKED SECURITIES TRUST	DISTRICT BUILD AMERICA BONDS GENERAL OBLIGATION UNLIMITED 6.75% DUE 08/01/49 DATED 07/22/10 SINKABLE	Bonds (\$400,000 par value)	519,560	480,288
	MASTR ALTERNATIVE LOANS TRUST	SERIES 2004-0PT2 CLASS A1 VARIABLE RATE DUE 9/25/34 DATED 10/19/04	Bonds (\$112,385 par value)	102,832	102,950
	MERRILL LYNCH & CO INC	SERIES 2004-3 CLASS 2A1 6.25% DUE 04/25/34 DATED 03/01/04	Bonds (\$34,119 par value)	26,783	35,016
	META PLATFORMS INC	SUBORDINATED NOTE 7.75% DUE 05/14/38 DATED 05/14/08	Bonds (\$100,000 par value)	139,780	126,360
	METLIFE INC	SENIOR UNSECURED NOTE 5.6% DUE 05/15/53 DATED 05/03/23 CALLABLE 11/15/52	Bonds (\$115,000 par value)	114,681	124,682
	METROPOLITAN WASHINGTON DC ARPT AUTH	SENIOR UNSECURED NOTE VARIABLE RATE DUE 12/15/44 DATED 9/15/14	Bonds (\$179,000 par value)	169,200	169,747
	MLCC MORTGAGE INVESTORS INC	DULLES TOLL ROAD REV TAXABLE REF METRORAIL & CAPITAL IMPT PROJ SL B 3.562% DUE 10/01/41 DATED 02/16/22 SINKABLE CALLABLE 10/01/31	Bonds (\$200,000 par value)	200,000	168,572
	MORGAN STANLEY	SERIES 2004-B CLASS A2 VARIABLE RATE DUE 5/25/29 DATED 5/27/04	Bonds (\$9,091 par value)	8,682	8,821
	MORGAN STANLEY	SENIOR UNSECURED NOTE VARIABLE RATE DUE 01/21/33 DATED 01/24/22 CALLABLE 01/21/32	Bonds (\$430,000 par value)	430,000	384,097
	MORGAN STANLEY	SENIOR UNSECURED NOTE VARIABLE RATE DUE 07/21/34 DATED 07/21/23 CALLABLE 07/21/33	Bonds (\$150,000 par value)	150,548	156,429

(Continued)

EVERGY, INC.
JOINT TRUSTED RETIREMENT PLAN
EIN No. 82-2733395, Plan No. 002

FORM 5500, SCHEDULE H, PART IV, LINE 4i — SCHEDULE OF ASSETS (HELD AT END OF YEAR)
AS OF SEPTEMBER 30, 2024

(a)	(b) Identity of Issue, Borrower, Lessor, or Similar Party	(c) Description of Investment Including Maturity Date, Rate of Interest	Collateral, Par, or Maturity Value	(d) Cost	(e) Current Value
	Bonds (continued):				
	MORGAN STANLEY MORTGAGE LOAN TRUST	SERIES 2004-5AR CLASS 3A1 VARIABLE RATE DUE 7/25/34 DATED 6/1/04	Bonds (\$16,181 par value)	\$ 10,538	\$ 16,082
	NAPA VALLEY CA UNIFIED SCHOOL DIST	BUILD AMERICA BONDS TAXABLE-B GENERAL OBLIGATION UNLIMITED 6.507% DUE 08/01/43 DATED 02/04/10 SINKABLE	Bonds (\$250,000 par value)	247,303	288,070
	NEVADA POWER CO	SECURED NOTE 5.375% DUE 09/15/40 DATED 09/14/10 CALLABLE 03/15/40	Bonds (\$255,000 par value)	319,737	258,389
	NEVADA POWER COMPANY	SECURED NOTE 5.9% DUE 05/01/53 DATED 10/19/22 CALLABLE 11/01/52	Bonds (\$150,000 par value)	149,133	162,657
	NEW CENTURY HOME EQUITY LOAN TRUST	SERIES 2003-A CLASS A VARIABLE RATE DUE 10/25/33 DATED 9/30/03	Bonds (\$76,174 par value)	71,032	75,486
	NEW CENTURY HOME EQUITY LOAN TRUST	SERIES 2004-3 CLASS M2 VARIABLE RATE DUE 11/25/34 DATED 9/29/04	Bonds (\$2,035 par value)	1,954	2,155
	NEW RESIDENTIAL MORTGAGE LOAN TRUST	SERIES 2017-2A CLASS A3 VARIABLE RATE DUE 03/25/57 DATED 04/01/17	Bonds (\$26,296 par value)	27,345	25,513
	NEW RESIDENTIAL MORTGAGE LOAN TRUST	SERIES 2017-6A CLASS A1 VARIABLE RATE DUE 8/27/57 DATED 9/1/17	Bonds (\$49,055 par value)	50,710	47,730
	NEW YORK LIFE INSURANCE	SUBORDINATED NOTE 6.75% DUE 11/15/39 DATED 10/08/09	Bonds (\$100,000 par value)	116,173	117,692
	NEW YORK NY	BUILD AMERICA BONDS GENERAL OBLIGATION UNLIMITED 5.846% DUE 06/01/40 DATED 06/16/10 SINKABLE	Bonds (\$100,000 par value)	100,000	106,468
	NIAGARA MOHAWK POWER	SENIOR UNSECURED NOTE 5.783% DUE 09/16/52 DATED 09/16/22 CALLABLE 03/16/52	Bonds (\$125,000 par value)	125,000	130,140
	NM STATE MORTGAGE FINANCE	AUTHORITY TAXABLE MBS PASS THROUGH PROGRAM CLASS I GNMA INSURED 2.2% DUE 01/01/44 DATED 02/23/22 CALLABLE 03/01/31	Bonds (\$238,319 par value)	238,319	209,473
	NORTHWESTERN MUTUAL LIFE	SUBORDINATED NOTE 3.85% DUE 09/30/47 DATED 09/26/17 CALLABLE 03/30/47	Bonds (\$210,000 par value)	189,357	169,136
	NOVASTAR HOME EQUITY LOAN	SERIES 2004-1 CLASS M3 VARIABLE RATE DUE 6/25/34 DATED 3/11/04	Bonds (\$12,618 par value)	11,830	12,341
	ONSLow BAY FINANCIAL LLC	SERIES 2022-NQM1 CLASS A1 VARIABLE RATE DUE 11/25/61 DATED 01/01/22	Bonds (\$247,522 par value)	247,522	222,809
	PA STATE PUBLIC SCHOOL BUILDING AUTH	REVENUE QUALIFIED CONSTRUCTION BOND TAXABLE A DIRECT SUBSIDY 5% DUE 09/15/27 DATED 10/06/10 SINKABLE	Bonds (\$250,000 par value)	223,238	255,502
	PAYPAL HOLDINGS INC	SENIOR UNSECURED NOTE 5.25% DUE 06/01/62 DATED 05/23/22 CALLABLE 12/01/61	Bonds (\$115,000 par value)	110,952	116,105
	PEPSICO INC	SENIOR UNSECURED NOTE 4.65% DUE 02/15/53 DATED 02/15/23 CALLABLE 08/15/52	Bonds (\$120,000 par value)	119,923	116,108
	PFIZER INC	SENIOR UNSECURED NOTE 5.6% DUE 09/15/40 DATED 09/15/15	Bonds (\$100,000 par value)	109,751	107,615
	PHILIP MORRIS INTL INC	SENIOR UNSECURED NOTE 4.375% DUE 11/15/41 DATED 11/15/11	Bonds (\$300,000 par value)	293,859	273,009
	PHILLIPS 66 COMPANY	SENIOR UNSECURED NOTE 4.68% DUE 02/15/45 DATED 02/15/23 CALLABLE 08/15/44	Bonds (\$90,000 par value)	80,426	81,198
	POTOMAC ELECTRIC POWER PRESIDENT & FELLOWS OF HARVARD NOTE	SECURED NOTE 7.9% DUE 12/15/38 DATED 12/10/08	Bonds (\$175,000 par value)	270,702	229,626
	PRINCIPAL FINANCIAL GROUP	5.625% DUE 10/01/38 DATED 01/30/08	Bonds (\$500,000 par value)	554,045	558,685
	PROGRESS RESIDENTIAL TRUST	SENIOR UNSECURED NOTE 5.5% DUE 03/15/53 DATED 03/08/23 CALLABLE 09/15/52	Bonds (\$80,000 par value)	79,801	82,299
	PROTECTIVE LIFE GLOBAL	SERIES 2022-SFR1 CLASS A 2.709% DUE 02/17/29 DATED 02/09/22	Bonds (\$297,840 par value)	297,827	276,192
	PUB SVC NEW HAMPSHIRE	SECURED NOTE 5.366% DUE 01/06/26 DATED 01/06/23	Bonds (\$250,000 par value)	250,000	253,070
		FIRST LIEN NOTE 5.15% DUE 01/15/53 DATED 01/11/23 CALLABLE 07/15/52	Bonds (\$120,000 par value)	119,183	120,538

(Continued)

EVERGY, INC.
JOINT TRUSTED RETIREMENT PLAN
EIN No. 82-2733395, Plan No. 002

FORM 5500, SCHEDULE H, PART IV, LINE 4i — SCHEDULE OF ASSETS (HELD AT END OF YEAR)
AS OF SEPTEMBER 30, 2024

(a)	(b) Identity of Issue, Borrower, Lessor, or Similar Party	(c) Description of Investment Including Maturity Date, Rate of Interest	Collateral, Par, or Maturity Value	(d) Cost	(e) Current Value
Bonds (continued):					
	PUBLIC SERVICE ENTERPRIS	SENIOR UNSECURED NOTE 8.625% DUE 04/15/31 DATED 04/15/21 CALLABLE 10/15/30	Bonds (\$100,000 par value)	\$ 100,000	\$ 117,618
	PUGET SOUND ENERGY INC NOTE	4.434% DUE 11/15/41 DATED 11/16/11 CALLABLE 05/15/41	Bonds (\$300,000 par value)	300,000	268,881
	QUALCOMM INC	SENIOR UNSECURED NOTE 6% DUE 05/20/53 DATED 11/09/22 CALLABLE 11/20/52	Bonds (\$95,000 par value)	106,239	107,662
	RBSGC MORTGAGE PASS THROUGH	CERTIFICATES SERIES 2007-B CLASS 3A1 5.4504% DUE 07/25/35 DATED 03/01/07	Bonds (\$1,096 par value)	887	1,110
	RBSGC MORTGAGE PASS THROUGH CERTS	SERIES 2007-B CLASS 2A1 6.0826% DUE 11/25/21 DATED 03/01/07	Bonds (\$11,995 par value)	12,188	7,464
	REALTY INCOME CORPORATION	SENIOR UNSECURED NOTE 5.125% DUE 02/15/34 DATED 01/16/24 CALLABLE 11/15/33	Bonds (\$225,000 par value)	222,548	230,042
	RELIANCE STAND LIFE II	SECURED NOTE 2.75% DUE 01/21/27 DATED 01/21/20	Bonds (\$325,000 par value)	324,096	309,673
	RESIDENTIAL ACCREDIT LOANS INC	SERIES 2006-QS13 CLASS 2A1 5.75% DUE 09/25/21 DATED 09/01/06	Bonds (\$332 par value)	328	201
	ROCKWELL AUTOMATION	SENIOR UNSECURED NOTE 4.2% DUE 03/01/49 DATED 03/01/19 CALLABLE 09/01/48	Bonds (\$160,000 par value)	130,926	142,034
	RTX CORPORATION	SENIOR UNSECURED NOTE 4.7% DUE 12/15/41 DATED 06/15/20	Bonds (\$150,000 par value)	187,794	142,245
	SCENTRE MANAGEMENT LTD RE1 LTD	SENIOR UNSECURED NOTE 3.75% DUE 03/23/27 DATED 03/23/17 CALLABLE 12/23/26	Bonds (\$125,000 par value)	124,186	122,972
	SEQUOIA MORTGAGE TRUST	SERIES 2016-3 CLASS A1 VARIABLE RATE DUE 11/25/46 DATED 10/01/16	Bonds (\$31,546 par value)	31,753	29,191
	SEQUOIA MORTGAGE TRUST	SERIES 2017-5 CLASS A1 VARIABLE RATE DUE 8/25/47 DATED 7/1/17	Bonds (\$27,224 par value)	27,641	25,033
	SEQUOIA MORTGAGE TRUST	SERIES 2017-6 CLASS A1 VARIABLE RATE DUE 09/25/47 DATED 08/01/17	Bonds (\$13,752 par value)	14,036	12,681
	SHELL INTERNATIONAL FINANCE	SENIOR UNSECURED NOTE 3.125% DUE 11/07/49 DATED 11/07/19 CALLABLE 05/07/49	Bonds (\$195,000 par value)	189,965	141,213
	SIMON PROPERTY GROUP LP	SENIOR UNSECURED NOTE 6.75% DUE 02/01/40 DATED 01/25/10 CALLABLE 11/01/39	Bonds (\$80,000 par value)	82,997	92,801
	SOCIAL PROFESSIONAL LOAN PROGRAM	SERIES 2020-A CLASS A2FX 2.54% DUE 05/15/46 DATED 01/17/20	Bonds (\$63,087 par value)	63,056	60,034
	SOUTH CAROLINA ELECTRIC & GAS NOTE	5.45% DUE 02/01/41 DATED 01/27/11 CALLABLE 08/01/40	Bonds (\$510,000 par value)	617,029	529,752
	SOUTHERN CAL EDISON NOTE	5.5% DUE 03/15/40 DATED 03/11/10	Bonds (\$240,000 par value)	237,113	249,662
	SOUTHERN PACIFIC SECURED ASSETS CORP	SERIES 1998-2 CLASS A7 6.74% DUE 07/25/29 DATED 06/01/98	Bonds (\$23,322 par value)	23,410	22,751
	STANFORD UNIVERSITY	SENIOR UNSECURED NOTE 4.013% DUE 05/01/42 DATED 04/11/12	Bonds (\$500,000 par value)	500,000	452,995
	STAR TRUST	SERIES 2021-SFR1 CLASS A VARIABLE RATE DUE 04/17/38 DATED 03/10/21	Bonds (\$289,576 par value)	289,576	287,805
	STRUCTURED ADJUSTABLE RATE MORTGAGE	LOAN TRUST SERIES 2004-1 CLASS 3A3 VARIABLE RATE DUE 2/25/34 DATED 1/1/04	Bonds (\$10,145 par value)	9,841	9,625
	STRUCTURED ADJUSTABLE RATE MORTGAGE	LOAN TRUST SERIES 2004-14 CLASS 3A2 VARIABLE RATE DUE 10/25/34 DATED 9/1/04	Bonds (\$32,712 par value)	32,590	31,572
	STRUCTURED ASSET SECURITIES CORP	SERIES 2001-SB1 CLASS A2 3.375% DUE 08/25/31 DATED 06/01/01	Bonds (\$4,047 par value)	3,097	4,030
	STRUCTURED ASSET SECURITIES CORP	SERIES 2001-SB1 CLASS A5 3.375% DUE 08/25/31 DATED 06/01/01	Bonds (\$4,441 par value)	4,083	3,671
	SYNCHRONY CARD ISSUANCE TRUST	SERIES 2023-A1 CLASS A 5.54% DUE 07/15/29 DATED 08/09/23	Bonds (\$250,000 par value)	249,969	255,278

(Continued)

EVERGY, INC.
JOINT TRUSTED RETIREMENT PLAN
EIN No. 82-2733395, Plan No. 002

FORM 5500, SCHEDULE H, PART IV, LINE 4i — SCHEDULE OF ASSETS (HELD AT END OF YEAR)
AS OF SEPTEMBER 30, 2024

(a)	(b) Identity of Issue, Borrower, Lessor, or Similar Party	(c) Description of Investment Including Maturity Date, Rate of Interest	Collateral, Par, or Maturity Value	(d) Cost	(e) Current Value
	Bonds (continued):				
	T MOBILE USA INC	SENIOR UNSECURED NOTE 5.5% DUE 01/15/55 DATED 01/12/24 CALLABLE 07/15/54	Bonds (\$185,000 par value)	\$ 184,808	\$ 191,640
	TEACHERS INSURANCE & ANNUITY	SUBORDINATED NOTE 4.27% DUE 05/15/47 DATED 05/08/17 CALLABLE 11/15/46	Bonds (\$130,000 par value)	96,836	112,982
	TENN VALLEY AUTHORITY	SENIOR UNSECURED NOTE 4.25% DUE 09/15/52 DATED 09/13/22	Bonds (\$175,000 par value)	169,375	162,613
	TENNESSEE GAS PIPELINE	SENIOR UNSECURED NOTE 8.375% DUE 06/15/32 DATED 06/10/02	Bonds (\$100,000 par value)	127,153	118,819
	TENNESSEE VALLEY AUTHORITY	SENIOR UNSECURED NOTE 5.25% DUE 09/15/39 DATED 09/15/09	Bonds (\$600,000 par value)	668,622	653,034
	TEXAS EASTERN TRANSMISSION	SENIOR UNSECURED NOTE 4.15% DUE 01/15/48 DATED 01/09/18 CALLABLE 07/15/47	Bonds (\$170,000 par value)	154,005	137,527
	TEXAS INSTRUMENTS INC	SENIOR UNSECURED NOTE 5.05% DUE 05/18/63 DATED 05/18/23 CALLABLE 11/18/62	Bonds (\$120,000 par value)	119,000	120,414
	THOMAS JEFFERSON UNIVERSITY	SECURED NOTE ASSURED GUARANTY MUNICIPAL COR INS 3.602% DUE 11/01/42 DATED 02/02/22 SINKABLE	Bonds (\$210,000 par value)	210,000	165,031
	TORCHMARK CORP	SENIOR UNSECURED NOTE 4.55% DUE 09/15/28 DATED 09/27/18 CALLABLE 06/15/28	Bonds (\$200,000 par value)	239,394	199,804
	TOSCO CORPORATION NOTE	8.125% DUE 02/15/30 DATED 02/15/00	Bonds (\$210,000 par value)	246,500	249,339
	TOTALENERGIES CAP SA	SENIOR NOTE 5.488% DUE 04/05/54 DATED 04/05/24 CALLABLE 10/05/53	Bonds (\$125,000 par value)	125,000	129,180
	TRIBUTE RAIL LLC	SERIES 2022-1 CLASS A 4.76% DUE 05/17/52 DATED 05/25/22	Bonds (\$248,725 par value)	248,675	247,368
	TRINITY RAIL LEASING LP	SERIES 2019-1A CLASS A 3.82% DUE 04/17/49 DATED 04/10/19	Bonds (\$193,609 par value)	193,512	189,657
	TRUIST BANK	SUBORDINATED NOTE 3.3% DUE 05/15/26 DATED 05/16/16 CALLABLE 04/15/26	Bonds (\$305,000 par value)	321,174	299,476
	UNION PACIFIC CORP	SENIOR UNSECURED NOTE 3.375% DUE 02/14/42 DATED 02/14/22 CALLABLE 08/14/41	Bonds (\$105,000 par value)	104,863	86,179
	UNITED STATES TREASURY BOND	1.875% DUE 02/15/41 DATED 02/15/21	Bonds (\$250,000 par value)	195,762	183,432
	UNITED STATES TREASURY BOND	2.25% DUE 08/15/49 DATED 08/15/19	Bonds (\$885,000 par value)	750,105	613,455
	UNITED STATES TREASURY BOND	2.375% DUE 02/15/42 DATED 02/15/22	Bonds (\$410,000 par value)	328,641	319,480
	UNITED STATES TREASURY BOND	2.375% DUE 05/15/51 DATED 05/15/21	Bonds (\$175,000 par value)	108,760	123,522
	UNITED STATES TREASURY BOND	2.875% DUE 05/15/43 DATED 05/15/13	Bonds (\$175,000 par value)	151,313	145,346
	UNITED STATES TREASURY BOND	2.875% DUE 05/15/49 DATED 05/15/19	Bonds (\$400,000 par value)	304,141	315,900
	UNITED STATES TREASURY BOND	3% DUE 02/15/48 DATED 02/15/18	Bonds (\$375,000 par value)	317,651	305,115
	UNITED STATES TREASURY BOND	3% DUE 05/15/45 DATED 05/15/15	Bonds (\$250,000 par value)	220,449	207,920
	UNITED STATES TREASURY BOND	3% DUE 08/15/48 DATED 08/15/18	Bonds (\$500,000 par value)	447,012	405,645
	UNITED STATES TREASURY BOND	3.125% DUE 05/15/48 DATED 05/15/18	Bonds (\$450,000 par value)	382,289	373,896
	UNITED STATES TREASURY BOND	3.5% DUE 02/15/39 DATED 02/17/09	Bonds (\$215,000 par value)	173,907	205,308
	UNITED STATES TREASURY BOND	3.625% DUE 02/15/44 DATED 02/15/14	Bonds (\$170,000 par value)	150,921	156,958
	UNITED STATES TREASURY BOND	5.375% DUE 02/15/31 DATED 02/15/01	Bonds (\$925,000 par value)	1,017,103	1,019,202
	UNITED STATES TREASURY NOTE	4.5% DUE 11/15/33 DATED 11/15/23	Bonds (\$400,000 par value)	408,266	422,516
	UNIVERSITY OF CHICAGO NOTE	5.42% DUE 10/01/30 DATED 05/19/10 SINKABLE	Bonds (\$456,000 par value)	455,530	477,222
	US BANCORP	SENIOR UNSECURED NOTE VARIABLE RATE DUE 01/23/35 DATED 01/23/24 CALLABLE 01/23/34	Bonds (\$120,000 par value)	120,000	127,200
	USQ RAIL I LLC	SERIES 2021-1A CLASS A 2.25% DUE 02/28/51 DATED 02/25/21	Bonds (\$304,686 par value)	304,679	280,338
	VANTAGE DATA CENTERS LLC	SERIES 2023-1A CLASS A2 6.316% DUE 03/16/48 DATED 03/21/23	Bonds (\$265,000 par value)	265,000	268,999
	VERIZON COMMUNICATIONS	SENIOR UNSECURED NOTE 4.5% DUE 08/10/33 DATED 08/10/17	Bonds (\$120,000 par value)	119,662	118,574
	VIRGINIA POWER FUEL SECURITIZATION	SECURED NOTE 4.877% DUE 05/01/31 DATED 02/14/24 SINKABLE	Bonds (\$250,000 par value)	249,991	257,322

(Continued)

EVERGY, INC.
JOINT TRUSTED RETIREMENT PLAN
EIN No. 82-2733395, Plan No. 002

FORM 5500, SCHEDULE H, PART IV, LINE 4i — SCHEDULE OF ASSETS (HELD AT END OF YEAR)
AS OF SEPTEMBER 30, 2024

(a) Similar Party	(b) Identity of Issue, Borrower, Lessor, or	(c) Description of Investment Including	(d) Cost	(e) Current Value
Bonds (continued):				
VODAFONE GROUP PLC		SENIOR UNSECURED NOTE 4.875% DUE 06/19/49 DATED 06/19/19	Bonds (\$175,000 par value)	\$ 171,939 \$ 160,858
WW GRAINGER INC		SENIOR UNSECURED NOTE 4.6% DUE 06/15/45 DATED 06/11/15 CALLABLE 12/15/44	Bonds (\$170,000 par value)	175,625 161,112
Total bonds			38,613,473	37,171,127
Money market funds				
FINANCIAL SQUARE TR GOVERNMENT		INSTITUTIONAL CLASS FD #465 (PRINCIPAL)	Money market funds (3,677,733 shares)	3,677,733 3,677,733
Total money market funds			3,677,733	3,677,733
Common collective trusts				
SEI CORE PROPERTY COLLECTIVE FUND			Common Collective Trust (8,358 units)	9,599,949 26,387,660
SEI SPECIAL SITUATIONS		COLLECTIVE FUND	Common Collective Trust (5,722 units)	6,355,158 13,583,355
Total common collective trusts			15,955,107	39,971,015
TOTAL INVESTMENTS			\$ 136,905,869	\$ 182,170,855

* Represents a party-in-interest to the Plan.

See accompanying Independent Auditors' Report.

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Line 32 – Schedule of Amortization Bases

The amount needed to amortize the Funding Shortfall to the Applicable Funding Target for the plan year beginning October 1, 2023 is determined below. The Funding Shortfall is amortized in fifteen level payments using the interest rates for determining the Applicable Funding Target for the current plan year.

1. Applicable Funding Target	\$205,370,229
2. Actuarial Value of Assets less Carryover and Prefunding Balances	181,274,260
3. Funding Shortfall [(1) - (2), but not < \$0]	24,095,969
4. Amortization factor	10.919330
5. Shortfall Amortization for current plan year [(3) ÷ (4)]	2,206,726

Evergy, Inc. Joint Trusteed Retirement Plan
EIN 82-2733395, PN 002
2023 Schedule SB, Line 24 – Change in Actuarial Assumptions

As of October 1, 2023, expenses were updated to the prior year expenses paid from the trust plus the current year PBGC premium, rounded to the nearest 10,000.