

Form 5500

Annual Return/Report of Employee Benefit Plan

OMB Nos. 1210-0110 1210-0089

2024

This Form is Open to Public Inspection

Department of the Treasury Internal Revenue Service

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.

Department of Labor Employee Benefits Security Administration

Pension Benefit Guaranty Corporation

Part I Annual Report Identification Information

For calendar plan year 2024 or fiscal plan year beginning 01/01/2024 and ending 12/31/2024

- A This return/report is for: [] a multiemployer plan [X] 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 TRINITY HEALTH CORPORATION WELFARE BENEFIT PLAN
1b Three-digit plan number (PN) 504
1c Effective date of plan 01/01/2002
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) TRINITY HEALTH 20555 VICTOR PARKWAY LIVONIA, MI 48152
2b Employer Identification Number (EIN) 35-1443425
2c Plan Sponsor's telephone number 734-343-2705
2d Business code (see instructions) 622000

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 rows for employer/plan sponsor and DFE.

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

Form 5500 (2024) v. 240311

3a Plan administrator's name and address <input checked="" type="checkbox"/> Same as Plan Sponsor	3b Administrator's EIN	
	3c Administrator's telephone number	
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	158270
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 a(2) Total number of active participants at the end of the plan year b Retired or separated participants receiving benefits..... c Other retired or separated participants entitled to future benefits d Subtotal. Add lines 6a(2) , 6b , and 6c e Deceased participants whose beneficiaries are receiving or are entitled to receive benefits. f Total. Add lines 6d and 6e g(1) Number of participants with account balances as of the beginning of the plan year (only defined contribution plans complete this item) g(2) Number of participants with account balances as of the end of the plan year (only defined contribution plans complete this item) h Number of participants who terminated employment during the plan year with accrued benefits that were less than 100% vested.....	6a(1)	158270
	6a(2)	163776
	6b	
	6c	
	6d	163776
	6e	
	6f	
	6g(1)	
6g(2)		
6h		
7 Enter the total number of employers obligated to contribute to the plan (only multiemployer plans complete this item)	7	

8a If the plan provides pension benefits, enter the applicable pension feature codes from the List of Plan Characteristics Codes in the instructions:

b If the plan provides welfare benefits, enter the applicable welfare feature codes from the List of Plan Characteristics Codes in the instructions:
4A

9a Plan funding arrangement (check all that apply)	9b Plan benefit arrangement (check all that apply)
(1) <input checked="" type="checkbox"/> Insurance	(1) <input checked="" type="checkbox"/> Insurance
(2) <input type="checkbox"/> Code section 412(e)(3) insurance contracts	(2) <input type="checkbox"/> Code section 412(e)(3) insurance contracts
(3) <input type="checkbox"/> Trust	(3) <input type="checkbox"/> Trust
(4) <input checked="" type="checkbox"/> General assets of the sponsor	(4) <input checked="" type="checkbox"/> General assets of the sponsor

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

<p>a Pension Schedules</p> <p>(1) <input 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 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 type="checkbox"/> H (Financial Information)</p> <p>(2) <input type="checkbox"/> I (Financial Information – Small Plan)</p> <p>(3) <input checked="" type="checkbox"/> A (Insurance Information) – Number Attached <u> 1 </u></p> <p>(4) <input type="checkbox"/> C (Service Provider Information)</p> <p>(5) <input 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 2024 Form M-1 annual report. If the plan was not required to file the 2024 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 _____

<p>SCHEDULE A (Form 5500)</p> <p>Department of the Treasury Internal Revenue Service</p> <hr/> <p>Department of Labor Employee Benefits Security Administration</p> <hr/> <p>Pension Benefit Guaranty Corporation</p>	<p>Insurance Information</p> <p>This schedule is required to be filed under section 104 of the Employee Retirement Income Security Act of 1974 (ERISA).</p> <p>▶ File as an attachment to Form 5500.</p> <p>▶ Insurance companies are required to provide the information pursuant to ERISA section 103(a)(2).</p>	<p>OMB No. 1210-0110</p> <hr/> <p>2024</p> <hr/> <p>This Form is Open to Public Inspection</p>
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For calendar plan year 2024 or fiscal plan year beginning **01/01/2024** and ending **12/31/2024**

<p>A Name of plan TRINITY HEALTH CORPORATION WELFARE BENEFIT PLAN</p>	<p>B Three-digit plan number (PN) ▶</p>	<p>504</p>
<p>C Plan sponsor's name as shown on line 2a of Form 5500 TRINITY HEALTH</p>	<p>D Employer Identification Number (EIN) 35-1443425</p>	

Part I Information Concerning Insurance Contract Coverage, Fees, and Commissions Provide information for each contract on a separate Schedule A. Individual contracts grouped as a unit in Parts II and III can be reported on a single Schedule A.

1 Coverage Information:

(a) Name of insurance carrier
KAISER

(b) EIN	(c) NAIC code	(d) Contract or identification number	(e) Approximate number of persons covered at end of policy or contract year	Policy or contract year	
				(f) From	(g) To
52-0954463	95639	3386	1245	01/01/2024	12/31/2024

2 Insurance fee and commission information. Enter the total fees and total commissions paid. List in line 3 the agents, brokers, and other persons in descending order of the amount paid.

(a) Total amount of commissions paid	(b) Total amount of fees paid
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3 Persons receiving commissions and fees. (Complete as many entries as needed to report all persons).

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

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(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

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(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

(a) Name and address of the agent, broker, or other person to whom commissions or fees were paid

(b) Amount of sales and base commissions paid	Fees and other commissions paid		(e) Organization code
	(c) Amount	(d) Purpose	

Part II Investment and Annuity Contract Information
 Where individual contracts are provided, the entire group of such individual contracts with each carrier may be treated as a unit for purposes of this report.

4 Current value of plan's interest under this contract in the general account at year end	4	
5 Current value of plan's interest under this contract in separate accounts at year end.....	5	

6 Contracts With Allocated Funds:

a State the basis of premium rates ▶

b Premiums paid to carrier **6b**

c Premiums due but unpaid at the end of the year **6c**

d If the carrier, service, or other organization incurred any specific costs in connection with the acquisition or retention of the contract or policy, enter amount. **6d**
 Specify nature of costs ▶

e Type of contract: (1) individual policies (2) group deferred annuity
 (3) other (specify) ▶

f If contract purchased, in whole or in part, to distribute benefits from a terminating plan, check here ▶

7 Contracts With Unallocated Funds (Do not include portions of these contracts maintained in separate accounts)

a Type of contract: (1) deposit administration (2) immediate participation guarantee
 (3) guaranteed investment (4) other ▶

b Balance at the end of the previous year **7b**

c Additions: (1) Contributions deposited during the year **7c(1)**
 (2) Dividends and credits..... **7c(2)**
 (3) Interest credited during the year..... **7c(3)**
 (4) Transferred from separate account **7c(4)**
 (5) Other (specify below)..... **7c(5)**
 ▶

(6) Total additions **7c(6)**

d Total of balance and additions (add lines **7b** and **7c(6)**) **7d**

e Deductions:

(1) Disbursed from fund to pay benefits or purchase annuities during year **7e(1)**
 (2) Administration charge made by carrier..... **7e(2)**
 (3) Transferred to separate account **7e(3)**
 (4) Other (specify below)..... **7e(4)**
 ▶

(5) Total deductions **7e(5)**

f Balance at the end of the current year (subtract line **7e(5)** from line **7d**)..... **7f**

Part III Welfare Benefit Contract Information
 If more than one contract covers the same group of employees of the same employer(s) or members of the same employee organizations(s), the information may be combined for reporting purposes if such contracts are experience-rated as a unit. Where contracts cover individual employees, the entire group of such individual contracts with each carrier may be treated as a unit for purposes of this report.

8 Benefit and contract type (check all applicable boxes)

- a** Health (other than dental or vision)
 b Dental
 c Vision
 d Life insurance
e Temporary disability (accident and sickness)
 f Long-term disability
 g Supplemental unemployment
 h Prescription drug
i Stop loss (large deductible)
 j HMO contract
 k PPO contract
 l Indemnity contract
m Other (specify) ▶

9 Experience-rated contracts:

a Premiums: (1) Amount received	9a(1)	
(2) Increase (decrease) in amount due but unpaid	9a(2)	
(3) Increase (decrease) in unearned premium reserve	9a(3)	
(4) Earned ((1) + (2) - (3))		9a(4)
b Benefit charges (1) Claims paid	9b(1)	
(2) Increase (decrease) in claim reserves	9b(2)	
(3) Incurred claims (add (1) and (2))		9b(3)
(4) Claims charged		9b(4)
c Remainder of premium: (1) Retention charges (on an accrual basis) --		
(A) Commissions	9c(1)(A)	
(B) Administrative service or other fees	9c(1)(B)	
(C) Other specific acquisition costs	9c(1)(C)	
(D) Other expenses	9c(1)(D)	
(E) Taxes	9c(1)(E)	
(F) Charges for risks or other contingencies	9c(1)(F)	
(G) Other retention charges	9c(1)(G)	
(H) Total retention		9c(1)(H)
(2) Dividends or retroactive rate refunds. (These amounts were <input type="checkbox"/> paid in cash, or <input type="checkbox"/> credited.)		9c(2)
d Status of policyholder reserves at end of year: (1) Amount held to provide benefits after retirement		9d(1)
(2) Claim reserves		9d(2)
(3) Other reserves		9d(3)
e Dividends or retroactive rate refunds due. (Do not include amount entered in line 9c(2).)		9e

10 Nonexperience-rated contracts:

a Total premiums or subscription charges paid to carrier	10a	8827431
b If the carrier, service, or other organization incurred any specific costs in connection with the acquisition or retention of the contract or policy, other than reported in Part I, line 2 above, report amount. Specify nature of costs.	10b	

Part IV Provision of Information

11 Did the insurance company fail to provide any information necessary to complete Schedule A? Yes No

12 If the answer to line 11 is "Yes," specify the information not provided. ▶

Regional Health Ministry / Ministry	Ministry Name	FEIN
Trinity Health System Office	Trinity Health Corporation	35-1443425
Trinity Health Senior Communities (THSC)	Trinity Continuing Care Services	38-2559656
Trinity Health at Home (THAH)	Trinity Home Health Services	38-2621935
Trinity Health at Home (THAH)	St Joseph's Health at Home Inc	87-1012253
Trinity Health PACE	Trinity Health Pace	47-3073124
Trinity Health PACE	Trinity Health LIFE Pennsylvania, Inc.	47-5244984
Saint Agnes Medical Center	Central Valley Health Plan, Inc.	61-1846844
Saint Agnes Medical Center	Saint Agnes Medical Center	94-1437713
Trinity Health Of New England	Saint Francis Care Medical Group, PC	06-1432373
Trinity Health Of New England	Trinity Health Of New England Corporation, Inc.	06-1491191
Trinity Health Of New England	Collaborative Laboratory Services	06-1520109
Trinity Health Mid-Atlantic	St. Francis Hospital, Inc.	51-0064326
Holy Cross Health	Holy Cross Hospital, Inc.	59-0791028
St. Mary's Health Care System	Good Samaritan Hospital, Inc.	26-1720984
St. Mary's Health Care System	St. Mary's Medical Group, Inc.	26-1858563
St. Mary's Health Care System	St. Mary's Sacred Heart Hospital, Inc.	47-3752176
St. Mary's Health Care System	St. Mary'S Health Care System, Inc.	58-0566223
Mercy Care (St. Joseph's Health System)	Saint Joseph's Mercy Care Services, Inc.	58-1752700
Saint Alphonsus Health System	Saint Alphonsus Health System, Inc.	27-1929502
Saint Alphonsus Health System	MedNow, Inc.	82-0389927
Loyola University Medical Center	Loyola University Medical Center	36-4015560
Saint Joseph Health System	Saint Joseph Regional Medical Center, Inc.	35-1568821
MercyOne Dubuque Medical Center	Mercy Health Services - Iowa, Corp.	31-1373080
MercyOne Central Iowa	Catholic Health Initiatives - Iowa Corp	42-0680448
MercyOne Dubuque Medical Center	Central Community Hospital	42-0818642
MercyOne Northeast Iowa	Covenant Medical Center, Inc	42-1264647
MercyOne Clinton Medical Center	Mercy Medical Center - Clinton, Inc.	42-1336618
MercyOne Siouxland Medical Center	Mercy Medical Services, Inc.	42-1283849
Holy Cross Health	Holy Cross Health, Inc.	52-0738041
Trinity Health Of New England	Brightside, Inc	04-2182395
Trinity Health Of New England	The Mercy Hospital, Inc.	04-3398280

Trinity Health Of New England	Mercy Specialist Physicians, Inc.	26-4033168
Trinity Health Of New England	Mercy Medical Group Inc.	45-4884805
Trinity Health Of New England	Riverbend Medical Group, Inc.	81-1807730
Trinity Health - Michigan	Probility Therapy Services	20-2020239
Trinity Health - Michigan	Advantage Health/Saint Mary's Medical Group	27-2491974
Trinity Health - Michigan	Trinity Health - Michigan	38-2113393
Trinity Health - Michigan	Hackley Health Ventures, Inc.	38-2589959
Trinity Health - Michigan	Mercy Health Partners	38-2589966
Integrated Health Associates (IHA)	IHA Health Services	38-3316559
St. Peter's Health Partners	St. Peter's Health Partners Medical Associates, P.C.	46-1177336
St. Peter's Health Partners	Glen At Hiland Meadows	16-1529639
St. Peter's Health Partners	Sunnyview Hospital and Rehabilitation Center	14-1338386
St. Peter's Health Partners	Samaritan Hospital	14-1338544
St. Peter's Health Partners	St. Peter's Hospital	14-1348692
St. Peter's Health Partners	Villa Mary Immaculate	14-1438749
St. Peter's Health Partners	Home Aide Service of Eastern New York, Inc.	14-1514867
St. Peter's Health Partners	The Community Hospice, Inc.	14-1608921
St. Peter's Health Partners	Capital Region Geriatric Center, Inc.	14-1701597
St. Peter's Health Partners	Senior Care Connection, Inc.	14-1708754
St. Peter's Health Partners	Beverwyck Inc	14-1717028
St. Peter's Health Partners	Heritage House Nursing Center, Inc.	14-1725101
St. Peter's Health Partners	Our Lady of Mercy Life Center	14-1743506
St. Peter's Health Partners	Seton Health at Schuyler Ridge Residential Healthcare	14-1756230
St. Peter's Health Partners	The Marjorie Doyle Rockwell Center, Inc.	14-1793885
St. Peter's Health Partners	Glen Eddy Inc	14-1794150
St. Peter's Health Partners	Empire Home Infusion Service, Inc.	14-1795732
St. Peter's Health Partners	Elhca	14-1818568
St. Joseph's Health	St. Joseph's Hospital Health Center	15-0532254
St. Peter's Health Partners	St. Joseph's Physician Health, P.C.	16-1516863
St. Peter's Health Partners	St. Peter's Hospital Foundation, Inc.	22-2262982
St. Peter's Health Partners	The James A. Eddy Memorial Geriatric Center, Inc.	22-2570478
St. Peter's Health Partners	The Community Hospice Foundation, Inc.	22-2692940

St. Peter's Health Partners	Samaritan Hospital and the Eddy Foundation (f/k/a The Northeast Health Foundation, Inc.)	22-2743478
St. Joseph's Health	St. Joseph's Medical, P.C.	27-3899821
St. Peter's Health Partners	St. Peter's Health Partners	45-3570715
St. Peter's Health Partners	Hawthorne Ridge Inc	80-0102840
Mount Carmel Health System	Mount Carmel Health Providers, Inc.	31-1382442
Mount Carmel Health System	Mount Carmel Health System	31-1439334
Saint Alphonsus Health System	Saint Alphonsus Medical Center - Ontario, Inc.	27-1789847
Saint Alphonsus Health System	Saint Alphonsus Medical Center - Baker City, Inc.	27-1790052
Trinity Health Mid-Atlantic	Nazareth Physician Services, Inc.	20-3261266
Trinity Health Mid-Atlantic	Mercy Catholic Medical Center of Southeastern Pennsylvania	23-1352191
Trinity Health Mid-Atlantic	St. Mary Medical Center	23-1913910
Trinity Health Mid-Atlantic	Trinity Health Mid-Atlantic Medical Group (f/k/a Langhorne Physician Services, Inc.)	23-2571699
Trinity Health Mid-Atlantic	Nazareth Hospital	23-2794121
Pittsburgh Mercy Health	Bethlehem Haven of Pittsburgh	25-1436685
Pittsburgh Mercy Health	Pittsburgh Mercy Health System, Inc.	25-1464211
Pittsburgh Mercy Health	Mercy Life Center Corporation	25-1604115
Diley Ridge Medical Center	Diley Ridge Medical Center	34-2032340
Sisters of the Holy Cross and Holy Cross Ministries	Sisters of the Holy Cross	35-0868159
Sisters of the Holy Cross and Holy Cross Ministries	Holy Cross Ministries	87-0359324
Academy of the Holy Cross	Academy of the Holy Cross	52-0683113
Trinity Health Of New England	ot_Assigned Company Not Assigned MOTHERHOUSE	04-2108390
Trinity Health Of New England	ot_Assigned Company Not Assigned GENESIS	04-2583993