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

2025

This Form is Open to Public Inspection

Part I Annual Report Identification Information

For calendar plan year 2025 or fiscal plan year beginning 01/01/2025 and ending 12/31/2025

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.)
- [X] a single-employer plan
- [ ] a DFE (specify) _____

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

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

D Check box if filing under:
- [X] 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
BARNES GROUP INC. CONSOLIDATED PENSION PLAN

1b Three-digit plan number (PN) ▶ 002

1c Effective date of plan 12/01/1950

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)
BARNES GROUP INC.

123 MAIN STREET
BRISTOL, CT 06010-6307

2b Employer Identification Number (EIN) 06-0247840

2c Plan Sponsor's telephone number 860-583-7070

2d Business code (see instructions) 332900

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

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

SIGN HERE	Filed with authorized/valid electronic signature.	10/13/2026	LORI PETTI
	Signature of plan administrator	Date	Enter name of individual signing as plan administrator
SIGN HERE			
	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

3a Plan administrator's name and address ☐ Same as Plan Sponsor

BARNES GROUP INC. BENEFITS COMMITTEE

123 MAIN STREET
BRISTOL, CT 06010-6307

3b Administrator's EIN: 06-0247840

3c Administrator's telephone number: 860-583-7070

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**	3058
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)**	66
a(2)	Total number of active participants at the end of the plan year	**6a(2)**	47
b	Retired or separated participants receiving benefits	**6b**	1745
c	Other retired or separated participants entitled to future benefits	**6c**	704
d	Subtotal. Add lines **6a(2)**, **6b**, and **6c**.	**6d**	2496
e	Deceased participants whose beneficiaries are receiving or are entitled to receive benefits.	**6e**	447
f	Total. Add lines **6d** and **6e**.	**6f**	2943
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**	0
7	Enter the total number of employers obligated to contribute to the plan (only multiemployer plans complete this item)	**7**	

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

1A

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

9a Plan funding arrangement (check all that apply)

- (1) ☐ Insurance
- (2) ☐ Code section 412(e)(3) insurance contracts
- (3) ☒ Trust
- (4) ☐ General assets of the sponsor

9b Plan benefit arrangement (check all that apply)

- (1) ☐ Insurance
- (2) ☐ Code section 412(e)(3) insurance contracts
- (3) ☒ Trust
- (4) ☐ General assets of the sponsor

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

a Pension Schedules

- (1) ☒ **R** (Retirement Plan Information)
- (2) ☐ **MB** (Multiemployer Defined Benefit Plan and Certain Money Purchase Plan Actuarial Information) - signed by the plan actuary
- (3) ☒ **SB** (Single-Employer Defined Benefit Plan Actuarial Information) - signed by the plan actuary
- (4) ☐ **DCG** (Individual Plan Information) – Number Attached _____
- (5) ☐ **MEP** (Multiple-Employer Retirement Plan Information)

b General Schedules

- (1) ☒ **H** (Financial Information)
- (2) ☐ **I** (Financial Information – Small Plan)
- (3) ☐ **A** (Insurance Information) – Number Attached 0
- (4) ☒ **C** (Service Provider Information)
- (5) ☒ **D** (DFE/Participating Plan Information)
- (6) ☐ **G** (Financial Transaction Schedules)

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 2025 Form M-1 annual report. If the plan was not required to file the 2025 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)

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

2025

This Form is Open to Public Inspection

For calendar plan year 2025 or fiscal plan year beginning 01/01/2025 and ending 12/31/2025

▶ **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
BARNES GROUP INC. CONSOLIDATED PENSION PLAN

B Three-digit plan number (PN) ▶ 002

C Plan sponsor's name as shown on line 2a of Form 5500 or 5500-SF
BARNES GROUP INC.

D Employer Identification Number (EIN)
06-0247840

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

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

Part I Basic Information

1 Enter the valuation date: Month 01 Day 01 Year 2025

2 Assets:

a Market value	**2a**	295096288
b Actuarial value	**2b**	289477600

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	2261	214918680	214918680
b For terminated vested participants	776	45136703	45136703
c For active participants	66	18157571	18768708
d Total	3103	278212954	278824091

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

a Funding target disregarding prescribed at-risk assumptions	**4a**	
b Funding target reflecting at-risk assumptions, but disregarding transition rule for plans that have been in at-risk status for fewer than five consecutive years and disregarding loading factor	**4b**	

5 Effective interest rate	**5**	5.32 %
6 Target normal cost		
a Present value of current plan year accruals	**6a**	0
b Expected plan-related expenses	**6b**	1085000
c Target normal cost	**6c**	1085000

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

10/06/2026
Date

TIMOTHY J. DIIULIO, F.S.A.
Type or print name of actuary

26-07805
Most recent enrollment number

MARSH
Firm name

212-345-8680
Telephone number (including area code)

99 HIGH STREET
BOSTON, MA 02110-2320
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)	5814394	9254533
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)	5814394	9254533
10	Interest on line 9 using prior year's actual return of 5.22 %	307387	484178
11	Prior year's excess contributions to be added to prefunding balance:		
	a Present value of excess contributions (line 38a from prior year)		0
	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 5.16 %		0
	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		0
	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)	6121781	9738711

Part III Funding Percentages

14	Funding target attainment percentage	14	99.75 %
15	Adjusted funding target attainment percentage	15	103.82 %
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	106.67 %
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
			Totals ► 18(b)	0	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	0

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: 5.00 %	2nd segment: 5.27 %	3rd segment: 5.50 %	☐ N/A, full yield curve used

b Applicable month (enter code)	**21b**	0
22 Weighted average retirement age	**22**	62

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

Part VI Miscellaneous Items

24 Has a change been made in the non-prescribed actuarial assumptions for the current plan year? If "Yes," see instructions regarding required attachment. ☒ Yes ☐ No

25 Has a method change been made for the current plan year? If "Yes," see instructions regarding required attachment. ☐ Yes ☒ No

26 Demographic and benefit information

a Is the plan required to provide a Schedule of Active Participants? If "Yes," see instructions regarding required attachment. ☒ Yes ☐ No

b Is the plan required to provide a projection of expected benefit payments? If "Yes," see instructions regarding required attachment ☒ Yes ☐ No

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

Part VII Reconciliation of Unpaid Minimum Required Contributions For Prior Years

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

Part VIII Minimum Required Contribution For Current Year

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

a Target normal cost (line 6c)	**31a**	1085000
b Excess assets, if applicable, but not greater than line 31a	**31b**	0

32 Amortization installments:	Outstanding Balance	Installment
a Net shortfall amortization installment	10448	1155
b Waiver amortization installment	0	0

33 If a waiver has been approved for this plan year, enter the date of the ruling letter granting the approval (Month _____ Day _____ Year _____)_and the waived amount	**33**	
34 Total funding requirement before reflecting carryover/prefunding balances (lines 31a - 31b + 32a + 32b - 33)	**34**	1086155

	Carryover balance	Prefunding balance	Total balance
35 Balances elected for use to offset funding requirement	1086155		1086155

36 Additional cash requirement (line 34 minus line 35)	**36**	0
37 Contributions allocated toward minimum required contribution for current year adjusted to valuation date (line 19c)	**37**	0
38 Present value of excess contributions for current year (see instructions)		
a Total (excess, if any, of line 37 over line 36)	**38a**	0
b Portion included in line 38a attributable to use of prefunding and funding standard carryover balances	**38b**	
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. ☐ 2019 ☐ 2020 ☒ 2021

SCHEDULE C (Form 5500)	Service Provider Information	OMB No. 1210-0110
Department of the Treasury Internal Revenue Service Department of Labor Employee Benefits Security Administration Pension Benefit Guaranty Corporation	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.**	**2025** **This Form is Open to Public Inspection.**

For calendar plan year 2025 or fiscal plan year beginning 01/01/2025 and ending 12/31/2025

A Name of plan
BARNES GROUP INC. CONSOLIDATED PENSION PLAN

B Three-digit plan number (PN) ▶ 002

C Plan sponsor's name as shown on line 2a of Form 5500
BARNES GROUP INC.

D Employer Identification Number (EIN)
06-0247840

Part I Service Provider Information (see instructions)

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

1 Information on Persons Receiving Only Eligible Indirect Compensation

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

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

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

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(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)

MERCER

13-2834414

(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	NONE	1430537	Yes [ ] No [X]	Yes [ ] No [ ]		Yes [ ] No [ ]

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

MERCER INVESTMENT MANAGEMENT

30-0282430

(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	NONE	608964	Yes [X] No [ ]	Yes [X] No [ ]	0	Yes [ ] No [X]

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

NELSON MULLINS RILEY & SCARBOROUGH

57-0215445

(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	NONE	136540	Yes [ ] No [X]	Yes [ ] No [ ]		Yes [ ] No [ ]

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

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

FIONDELLA,MILONE & LASARACINA LLP

06-1648707

(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	NONE	24523	Yes ☐ No ☒	Yes ☐ No ☐		Yes ☐ No ☐

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

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

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

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

Part I Service Provider Information (continued)

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

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

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

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

Part II Service Providers Who Fail or Refuse to Provide Information

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

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

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

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

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

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

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

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

(complete as many entries as needed)

a Name:

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)

Department of the Treasury
Internal Revenue Service

Department of Labor
Employee Benefits Security Administration

DFE/Participating Plan Information

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

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

OMB No. 1210-0110

2025

This Form is Open to Public Inspection.

For calendar plan year 2025 or fiscal plan year beginning 01/01/2025 and ending 12/31/2025

A Name of plan
BARNES GROUP INC. CONSOLIDATED PENSION PLAN

B Three-digit plan number (PN) ▶ 002

C Plan or DFE sponsor's name as shown on line 2a of Form 5500
BARNES GROUP INC.

D Employer Identification Number (EIN)
06-0247840

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: BARNES GROUP INC. PENSION TRUST

b Name of sponsor of entity listed in (a): BARNES GROUP INC.

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)
06-0247840-023	M	317340357

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Part II **Information on Participating Plans (to be completed by DFEs, other than DCGs)**
(Complete as many entries as needed to report all participating plans. DCGs must report each participating plan using Schedule DCG.)

a Plan name

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

a Plan name

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

a Plan name

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

a Plan name

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

a Plan name

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

a Plan name

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

a Plan name

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

a Plan name

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

a Plan name

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

a Plan name

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

a Plan name

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

a Plan name

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

a Plan name

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

SCHEDULE H (Form 5500)

Department of the Treasury
Internal Revenue Service

Department of Labor
Employee Benefits Security Administration

Pension Benefit Guaranty Corporation

Financial Information

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

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

OMB No. 1210-0110

2025

This Form is Open to Public Inspection

For calendar plan year 2025 or fiscal plan year beginning 01/01/2025 and ending 12/31/2025

A Name of plan
BARNES GROUP INC. CONSOLIDATED PENSION PLAN

B Three-digit plan number (PN) ▶ 002

C Plan sponsor's name as shown on line 2a of Form 5500
BARNES GROUP INC.

D Employer Identification Number (EIN)
06-0247840

Part I Asset and Liability Statement

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

Assets		(a) Beginning of Year	(b) End of Year
a Total noninterest-bearing cash	1a		
b Receivables (less allowance for doubtful accounts):			
(1) Employer contributions	1b(1)	0	0
(2) Participant contributions	1b(2)	0	0
(3) Other	1b(3)	0	0
c General investments:			
(1) Interest-bearing cash (include money market accounts & certificates of deposit)	1c(1)	0	0
(2) U.S. Government securities	1c(2)	0	0
(3) Corporate debt instruments (other than employer securities):			
(A) Preferred	1c(3)(A)	0	0
(B) All other	1c(3)(B)	0	0
(4) Corporate stocks (other than employer securities):			
(A) Preferred	1c(4)(A)	0	0
(B) Common	1c(4)(B)	0	0
(5) Partnership/joint venture interests	1c(5)	0	0
(6) Real estate (other than employer real property)	1c(6)	0	0
(7) Loans (other than to participants)	1c(7)	0	0
(8) Participant loans	1c(8)	0	0
(9) Value of interest in common/collective trusts	1c(9)	0	0
(10) Value of interest in pooled separate accounts	1c(10)	0	0
(11) Value of interest in master trust investment accounts	1c(11)	295096288	317340357
(12) Value of interest in 103-12 investment entities	1c(12)	0	0
(13) Value of interest in registered investment companies (e.g., mutual funds)	1c(13)	0	0
(14) Value of funds held in insurance company general account (unallocated contracts)	1c(14)	0	0
(15) Other	1c(15)	0	0

		(a) Beginning of Year	(b) End of Year
1d Employer-related investments:			
(1) Employer securities	1d(1)	0	0
(2) Employer real property	1d(2)	0	0
1e Buildings and other property used in plan operation	1e	0	0
1f Total assets (add all amounts in lines 1a through 1e)	1f	295096288	317340357
Liabilities			
1g Benefit claims payable	1g	0	0
1h Operating payables	1h	282722	158306
1i Acquisition indebtedness	1i	0	0
1j Other liabilities	1j	0	0
1k Total liabilities (add all amounts in lines 1g through1j)	1k	282722	158306
Net Assets			
1l Net assets (subtract line 1k from line 1f)	1l	294813566	317182051

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

		(a) Amount	(b) Total
(6) Net investment gain (loss) from common/collective trusts	2b(6)		0
(7) Net investment gain (loss) from pooled separate accounts	2b(7)		0
(8) Net investment gain (loss) from master trust investment accounts	2b(8)		47416431
(9) Net investment gain (loss) from 103-12 investment entities	2b(9)		0
(10) Net investment gain (loss) from registered investment companies (e.g., mutual funds)	2b(10)		0
c Other income	2c		0
d Total income. Add all **income** amounts in column (b) and enter total	2d		47416431
Expenses			
e Benefit payment and payments to provide benefits:			
(1) Directly to participants or beneficiaries, including direct rollovers	2e(1)	22523235	
(2) To insurance carriers for the provision of benefits	2e(2)	0	
(3) Other	2e(3)	0	
(4) Total benefit payments. Add lines **2e(1)** through **(3)**	2e(4)		22523235
f Corrective distributions (see instructions)	2f		0
g Certain deemed distributions of participant loans (see instructions)	2g		0
h Interest expense	2h		0
i Administrative expenses:			
(1) Salaries and allowances	2i(1)	0	
(2) Contract administrator fees	2i(2)	461072	
(3) Recordkeeping fees	2i(3)	0	
(4) IQPA audit fees	2i(4)	24523	
(5) Investment advisory and investment management fees	2i(5)	608964	
(6) Bank or trust company trustee/custodial fees	2i(6)	0	
(7) Actuarial fees	2i(7)	969464	
(8) Legal fees	2i(8)	136540	
(9) Valuation/appraisal fees	2i(9)	0	
(10) Other trustee fees and expenses	2i(10)	0	
(11) Other expenses	2i(11)	324148	
(12) Total administrative expenses. Add lines **2i(1)** through **(11)**	2i(12)		2524711
j Total expenses. Add all **expense** amounts in column (b) and enter total	2j		25047946
Net Income and Reconciliation			
k Net income (loss). Subtract line **2j** from line **2d**	2k		22368485
l Transfers of assets:			
(1) To this plan	2l(1)		
(2) From this plan	2l(2)		0

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) [X] 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) [X] 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: FIONDELLA, MILONE, & LASARACINA LLP **(2)** EIN: 06-1648707

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.)	**4a**		X	
b Were any loans by the plan or fixed income obligations due the plan in default as of the close of the plan year or classified during the year as uncollectible? Disregard participant loans secured by participant's account balance. (Attach Schedule G (Form 5500) Part I if "Yes" is checked.)	**4b**		X	
c Were any leases to which the plan was a party in default or classified during the year as uncollectible? (Attach Schedule G (Form 5500) Part II if "Yes" is checked.)	**4c**		X	
d Were there any nonexempt transactions with any party-in-interest? (Do not include transactions reported on line 4a. Attach Schedule G (Form 5500) Part III if "Yes" is checked.)	**4d**		X	
e Was this plan covered by a fidelity bond?	**4e**	X		10000000
f Did the plan have a loss, whether or not reimbursed by the plan's fidelity bond, that was caused by fraud or dishonesty?	**4f**		X	
g Did the plan hold any assets whose current value was neither readily determinable on an established market nor set by an independent third party appraiser?	**4g**		X	
h Did the plan receive any noncash contributions whose value was neither readily determinable on an established market nor set by an independent third party appraiser?	**4h**		X	
i Did the plan have assets held for investment? (Attach schedule(s) of assets if "Yes" is checked, and see instructions for format requirements.)	**4i**		X	
j Were any plan transactions or series of transactions in excess of 5% of the current value of plan assets? (Attach schedule of transactions if "Yes" is checked and see instructions for format requirements.)	**4j**		X	
k Were all the plan assets either distributed to participants or beneficiaries, transferred to another plan, or brought under the control of the PBGC?	**4k**		X	
l Has the plan failed to provide any benefit when due under the plan?	**4l**		X	
m If this is an individual account plan, was there a blackout period? (See instructions and 29 CFR 2520.101-3.)	**4m**			
n If 4m was answered "Yes," check the "Yes" box if you either provided the required notice or one of the exceptions to providing the notice applied under 29 CFR 2520.101-3.	**4n**			

5a Has a resolution to terminate the plan been adopted during the plan year or any prior plan year? [X] Yes [ ] No

If "Yes," enter the amount of any plan assets that reverted to the employer this year 0.

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.) ..... [X] Yes [ ] No [ ] Not determined

If "Yes" is checked, enter the My PAA confirmation number from the PBGC premium filing for this plan year 592827.

SCHEDULE R (Form 5500)

Department of the Treasury
Internal Revenue Service

Department of Labor
Employee Benefits Security Administration

Pension Benefit Guaranty Corporation

Retirement Plan Information

This schedule is required to be filed under 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.**

OMB No. 1210-0110

2025

This Form is Open to Public Inspection.

For calendar plan year 2025 or fiscal plan year beginning 01/01/2025 and ending 12/31/2025

A Name of plan
BARNES GROUP INC. CONSOLIDATED PENSION PLAN

B Three-digit plan number (PN) ▶ 002

C Plan sponsor's name as shown on line 2a of Form 5500
BARNES GROUP INC.

D Employer Identification Number (EIN)
06-0247840

Part I Distributions

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

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

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

EIN(s): 13-5160382

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** 4

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.)

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

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

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

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

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

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

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

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

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

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

Part III Amendments

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

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

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

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

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

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

Part V Additional Information for Multiemployer Defined Benefit Pension Plans

13 Enter the following information for each employer that (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: ☐ last contributing employer ☐ alternative ☐ reasonable approximation (see instructions for required attachment)	**14a**	
b The plan year immediately preceding the current plan year. ☐ 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. ☐ 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: 0.0 % Private Equity: 0.0 % Investment-Grade Debt and Interest Rate Hedging Assets: 97.1 %
High-Yield Debt: 1.8 % Real Assets: 0.0 % Cash or Cash Equivalents: 1.1 % Other: 0.0 %

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_____.

Structured Attachment

Department of the Treasury
Internal Revenue Service

Department of Labor
Employee Benefits Security Administration

Pension Benefit Guaranty Corporation

Schedule SB, line 26b
Schedule of Projection of Expected Benefit Payments

2025

This Form is Open to Public Inspection

Name of Plan	BARNES GROUP INC. CONSOLIDATED PENSION PLAN						
Plan Year Begin Date	01/01/2025	**Plan Year End Date**	12/31/2025	**EIN**	06-0247840	**PN**	002

Plan Year	Active Participants	Terminated Vested Participants	Retired Participants and Beneficiaries Receiving Payments	Total
2025	221372	609655	21928772	22759799
2026	402609	876161	21239854	22518624
2027	574262	1163617	20547329	22285208
2028	740831	1688963	19837943	22267737
2029	881689	1950080	19110673	21942442
2030	1010710	2153422	18344597	21508729
2031	1111126	2439160	17590681	21140967
2032	1218225	2820204	16828348	20866777
2033	1309637	2975274	16057829	20342740
2034	1371070	3184566	15271170	19826806
2035	1423438	3338150	14483141	19244729
2036	1464448	3490940	13689729	18645117
2037	1503340	3561318	12892950	17957608
2038	1546910	3703732	12095103	17345745
2039	1572191	3785422	11298834	16656447
2040	1598966	3764326	10507175	15870467
2041	1600357	3788338	9723522	15112217
2042	1599785	3782956	8951513	14334254
2043	1585985	3831441	8195240	13612666
2044	1576175	3832947	7457825	12866947
2045	1550751	3784209	6743394	12078354
2046	1523312	3727244	6055688	11306244
2047	1490067	3719614	5398314	10607995
2048	1443150	3637805	4774722	9855677
2049	1391336	3538667	4188195	9118198

Name of Plan	BARNES GROUP INC. CONSOLIDATED PENSION PLAN						
Plan Year Begin Date	01/01/2025	Plan Year End Date	12/31/2025	EIN	06-0247840	PN	002

Plan Year	Active Participants	Terminated Vested Participants	Retired Participants and Beneficiaries Receiving Payments	Total
2050	1336325	3449432	3641667	8427424
2051	1278395	3331562	3137547	7747504
2052	1216137	3204621	2677553	7098311
2053	1151327	3061145	2262624	6475096
2054	1084143	2910016	1892860	5887019
2055	1015213	2753422	1567472	5336107
2056	945452	2597161	1284809	4827422
2057	875572	2438360	1042477	4356409
2058	806274	2271720	837475	3915469
2059	738244	2105875	666391	3510510
2060	673254	1942650	525559	3141463
2061	609475	1779465	411201	2800141
2062	548429	1621183	319593	2489205
2063	490622	1469101	247179	2206902
2064	436233	1324284	190672	1951189
2065	385427	1187597	147130	1720154
2066	338734	1059666	113967	1512367
2067	295352	940861	88959	1325172
2068	255623	831329	70254	1157206
2069	219643	731038	56335	1007016
2070	187245	639801	45998	873044
2071	158307	557304	38301	753912
2072	132688	483147	32521	648356
2073	110213	416829	28111	555153
2074	90683	357820	24673	473176

Financial Statements

Barnes Group Inc.
Consolidated Pension Plan

Years ended December 31, 2025 and 2024
with Independent Auditors' Report

Barnes Group Inc. Consolidated Pension Plan

Financial Statements

Years ended December 31, 2025 and 2024

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Independent Auditors' Report

To the Benefits Committee
Barnes Group Inc.
Consolidated Pension Plan

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

We have performed audits of the accompanying financial statements of Barnes Group Inc. Consolidated Pension 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 December 31, 2025 and 2024, and the related statements of changes in net assets available for benefits for the years then ended, and the related notes to the financial statements.

Management, 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 a certification from a qualified institution as of December 31, 2025 and 2024, 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 audit and on the procedures performed as described in the Auditor's Responsibilities for the Audit of the Financial Statements section:

- The amounts and disclosures in the financial statements referred to above, 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 financial statements referred to above 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. Our responsibilities under those standards are further described in the Auditor's 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 for one year after the date the financial statements are 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.

Auditor's 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 auditor's 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 the financial statements.

Auditor's Responsibilities for the Audit of the Financial Statements (continued)

In performing an audit in accordance with generally accepted auditing standards, 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 certification, 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.

Fiondella, Milone & LaSaracina LLP

Glastonbury, Connecticut
October 8, 2026

Barnes Group Inc.
Consolidated Pension Plan

Statements of Net Assets Available for Benefits

	December 31, 2025	December 31, 2024
Assets		
Investments at fair value:		
Plan interest in investment income of Barnes Group Inc. Pension Trust	**$ 317,340,357**	$ 295,096,288
Total assets	**317,340,357**	295,096,288
Liabilities		
Accrued administrative expenses	**158,306**	282,722
Total liabilities	**158,306**	282,722
Net assets available for benefits	**$ 317,182,051**	$ 294,813,566

See accompanying notes.

Barnes Group Inc.
Consolidated Pension Plan

Statements of Changes in Net Assets Available for Benefits

	Years Ended December 31, 2025	2024
Additions		
Plan interest in investment income of Barnes Group Inc. Pension Trust, net of investment expenses	**$ 47,416,431**	$ 12,057,468
Total additions	**47,416,431**	12,057,468
Deductions		
Benefit payments	**22,523,235**	15,981,134
Administrative expenses	**2,524,711**	1,702,162
Total deductions	**25,047,946**	17,683,296
Net increase (decrease) before transfers	**22,368,485**	(5,625,828)
Transfer from Barnes Group, Inc. UAW Agreement and Pension Plan	**-**	72,047,741
Transfer from Barnes Group, Inc. Pension for Hourly Employees Milwaukee Plan	**-**	2,826,486
Net increase	**22,368,485**	69,248,399
Net assets available for benefits, beginning of year	**294,813,566**	225,565,167
Net assets available for benefits, end of year	**$ 317,182,051**	$ 294,813,566

See accompanying notes.

Barnes Group Inc.
Consolidated Pension Plan

Notes to Financial Statements

Years ended December 31, 2025 and 2024

1. Plan Description

The following description of the Barnes Group Inc. Consolidated Pension Plan (the Plan) provides only general information. Participants should refer to the Plan Document for a more complete description of the Plan's provisions. The Plan was formerly the Barnes Group Inc. Salaried Retirement Income Plan.

General

The Consolidated Pension Plan is a noncontributory defined benefit plan and applies to certain salaried and hourly employees, as defined by the Plan, of Barnes Group Inc. (the Company). It is subject to the provisions of the Employee Retirement Income Security Act of 1974 (ERISA).

As part of the De-Sta-Co Manufacturing (De-Sta-Co) acquisition in 2004, salaried employees and the related retirement plan assets were merged into the Salaried Retirement Income Plan. Provisions of the existing plan were retained.

The Company elected to freeze the Salaried Retirement Income Plan portion of the Consolidated Pension Plan effective December 31, 2012, therefore any employee who is hired, rehired, or reclassified from an ineligible to an eligible participation category under the Plan after December 31, 2012 shall not be eligible to participate in the Plan or resume participation in the Plan after such date.

Effective December 31, 2016, all assets and liabilities of the Hourly Plan and the Troy Plan were merged into the Plan. Also, effective December 31, 2016, the Plan's name was changed to the Barnes Group Inc. Consolidated Pension Plan.

The Hourly Plan was a noncontributory defined benefit plan available for full-time, nonunion hourly employees of Barnes Distribution and certain Precision Components locations of Barnes Group Inc. Effective December 31, 2003, the Barnes Group Inc. Bowman Products Division (Bowman) was merged with the Hourly Plan, including participants acquired in the Curtis Industries Inc. UAW Retirement Income Plan (Curtis) merger. The Bowman Plan assets were transferred in 2004, retaining the existing plan features. As part of the De-Sta-Co acquisition in 2004, the nonunion hourly employees and the related retirement plan assets were merged into the Hourly Plan. Provisions of the existing plan were retained. Effective August 31, 2005, the Barnes Group Inc. Elizabethtown, KY Division (Elizabethtown) was merged with the Hourly Plan, retaining existing plan features.

1. Plan Description (continued)

General (continued)

The Troy Plan was a noncontributory defined benefit plan established effective September 17, 2004, as a result of the De-Sta-Co acquisition. The Troy Plan was established for the union employees of De-Sta-Co from their predecessor plan. Participation in the predecessor plan had been frozen effective March 31, 2001.

The Company elected to freeze the Consolidated Pension Plan effective December 31, 2024 for all participants, therefore all benefit accruals are to be frozen as of that date. In connection with the Plan freeze, the Plan was amended to permit early retirement beginning at age 54 for all participants who were employees on or after January 1, 2024.

Effective December 31, 2024, all assets and liabilities of the Barnes Group Inc. UAW Agreement and Pension Plan, totaling $72,047,741 and the Barnes Group Inc. Pension for Hourly Employees Milwaukee Plan, totaling $2,826,486, were merged into the Plan. Effective April 4, 2024, the liabilities associated with active participants in the Barnes Group Inc. UAW Agreement and Pension Plan and the Barnes Group Inc. Pension for Hourly Employees Milwaukee Plan had been transferred to One Equity Partners. Therefore, the assets and liabilities received by the Plan due to the mergers on December 31, 2024 were not associated with active participants.

Pension Benefits

Participants are entitled to annual benefits based on the benefit formulas in accordance with the Plan Document. Benefit formulas are defined in the Plan Document and are based on highest average earnings, benefit rates, and/or years of credited service. Retirees may have the option to receive benefits in a variety of annuity forms of payment, as defined. The Plan permits early retirement beginning at age 55 for certain participants with at least ten years of credited service with benefits reduced in accordance with Plan provisions. Effective January 1, 2024, the Plan was amended to permit early retirement beginning at age 54 for all participants who were employees on or after January 1, 2024.

1. Plan Description (continued)

Termination

The Company has the right under the Plan to discontinue its contributions at any time and to terminate the Plan subject to the provisions set forth in ERISA. In the event the Plan terminates:

a) the Plan provides that the net assets shall be allocated among the participants and beneficiaries of the Plan in the order provided for in ERISA, and

b) to the extent there are unfunded vested benefits other than benefits becoming vested by virtue of the termination of the plan, ERISA provides that such benefits are payable to participants by the Pension Benefit Guaranty Corporation, up to specified limitations.

2. Summary of Significant Accounting Policies

Basis of Accounting

The financial statements of the Plan are prepared in conformity with accounting principles generally accepted in the United States of America.

Estimates

The preparation of financial statements in conformity with accounting principles generally accepted in the United States requires the plan administrator to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results may differ from those estimates.

Risks and Uncertainties

The Plan invests in various investment securities through the Barnes Group Inc. Pension Trust (the Master Trust). Investment securities, in general, are exposed to various risks, such as interest rate, credit, and overall market volatility. 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 those changes could materially affect the amounts reported in the financial statements.

2. Summary of Significant Accounting Policies (continued)

Investments

The Plan maintains an undivided interest in the Master Trust. The fair value of the Plan's interest in the Master Trust is based on the net asset value of the trust.

Contributions

Employer contributions are actuarially determined to provide the Plan with assets sufficient to meet the benefits to be paid to participants. The minimum funding requirements of ERISA resulted in no minimum employer contribution for the 2025 and 2024 plan years. There were no discretionary contributions made applicable to the 2025 and 2024 plan years.

Benefit Payments

Benefit payments are recorded upon distribution.

Administrative and Investment Expenses

All pension investment management, auditing and administrative fees are paid by the Plan.

Fair Value Measurements

The provisions of the accounting standard for fair value define fair value as 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. This standard classifies the inputs used to measure fair value into the following hierarchy:

Level 1 – Unadjusted quoted prices in active markets for identical assets or liabilities.

Level 2 – Unadjusted quoted prices in active markets for similar assets or liabilities, or unadjusted quoted prices for identical or similar assets or liabilities in markets that are not active, or inputs other than quoted prices that are observable for the asset or liability.

Level 3 – Unobservable inputs for the asset or liability.

3. Income Tax Status

The Plan has received a determination letter from the IRS dated January 25, 2017, stating that the Plan is qualified under Section 401(a) of the Internal Revenue Code, and, therefore, the related trust is exempt from taxation. Once qualified, the Plan is required to operate in conformity with the Code to maintain its qualification. The Plan has been amended since receiving the determination letter, however, the Plan Administrator believes that the Plan is being operated in compliance with the applicable requirements of the Code and therefore believes that the Plan is qualified and the related trust is tax exempt.

Accounting principles generally accepted in the United States of America require Plan management to evaluate tax positions taken by the Plan and recognize a tax liability if the Plan has taken an uncertain position that more likely than not would not be sustained upon examination by the IRS. The Plan is subject to routine audits by taxing jurisdictions; however, there are currently no audits for any tax periods in progress. The Plan Administrator believes it is no longer subject to income tax examinations for years prior to 2022.

4. Actuarial Present Value of Accumulated Plan Benefits

The actuarial present value of accumulated plan benefits is determined by an actuary and represents that amount resulting from the application of actuarial assumptions to adjust the accumulated plan benefits to reflect the time value of money and the probability of payment between the valuation date and the expected date of payment. These values are shown below for the Plan based on the actuarial assumptions for mortality, turnover, investment return and retirement age.

Actuarial present value of accumulated plan benefits as of January 1, 2025, and 2024 are as follows:

	January 1,	
	2025	**2024**
Vested benefits:		
Participants currently receiving payments	**$ 180,161,431**	$ 129,859,908
Other participants	**45,929,571**	45,283,928
	226,091,002	175,143,836
Nonvested benefits	**470,430**	665,641
Total actuarial present value of accumulated plan benefits	**$ 226,561,432**	$ 175,809,477

4. Actuarial Present Value of Accumulated Plan Benefits (continued)

Effective December 31, 2024, all assets and liabilities of the Barnes Group Inc. UAW Agreement and Pension Plan and the Barnes Group Inc. Pension for Hourly Employees Milwaukee Plan were merged into the Plan (see Note 1).

The change in accumulated plan benefits is summarized as follows:

Actuarial present value of accumulated plan benefits, as of January 1, 2024	**$ 175,809,477**
Increase during year attributable to:	
Benefits accumulated, including actuarial gains and losses	**(1,142,201)**
Interest	**12,658,493**
Benefits paid	**(15,981,134)**
Plan mergers	**55,216,797**
Net decrease	**50,751,955**
Actuarial present value of accumulated plan benefits, as of January 1, 2025	**$ 226,561,432**

Actuarial calculations for determining the 2025 and 2024 contributions were based upon employee data and asset values as of January 1, 2025 and 2024. The Plan's consulting actuary has reviewed and concurred with the following significant actuarial assumptions:

- Interest Rate of 7.75% as of January 1, 2025 and 2024.

- Mortality will be in accordance with the PRI2012 employee sex distinct base table with no contingent survivor adjustments and no collar adjustments applied and Mercer modified MP-2019 projection table (MMP 2019) for pre-retirement mortality, and the Mercer Industry Longevity Experience Studies base table for the "Automotive, Industrial Goods and Transportation" industry and the Mercer modified MP-2019 projection table (MMP 2019) for post-retirement mortality.

- Disability mortality is based on the 1985 Pension Disability Mortality Tables for males and females.

4. Actuarial Present Value of Accumulated Plan Benefits (continued)

- Turnover is estimated in accordance with the following table which indicates a sample of the probable annual rates of withdrawal:

Age	Rate
20-29	20.0%
30	15.0%
35	12.5%
40	10.0%
45	7.5%
50	5.0%
55 and over	10.0%

- Assumed retirement rates are as follows:

Age	All Employees
55-58	5%
59-60	10%
61-64	20%
65-66	30%
67-69	25%
70 and above	100%

- Expenses will be estimated based on $1,085,000 as of January 1, 2025 and $815,000 as of January 1, 2024 (average of two prior years' administrative expenses plus estimated PBGC premiums) added to the current year normal cost used to reduce expected return on assets component of pension expense.

- Spouses' benefits were estimated assuming that husbands are three years older than wives and that 80% of the male participants and 60% of the female participants who are or will become eligible for coverage under the Spouse's Benefit will be survived by an eligible spouse.

4. Actuarial Present Value of Accumulated Plan Benefits (continued)

Actuarial Cost Method

The actuarial present value of accumulated plan benefits is computed in accordance with the traditional unit credit method of funding.

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

5. Interest in Barnes Group Inc. Pension Trust

The Barnes Group Inc. Pension Trust, a Master Trust, was established for the investment of assets of the Plan and several other Barnes Group Inc. sponsored retirement plans. Each participating retirement plan has an undivided interest in the Master Trust. U.S. Bank National Association (U.S. Bank) served as the Trustee of the Plan throughout 2025 and 2024. At December 31, 2025 and 2024, the Plan's interest in the net assets of the Master Trust was approximately 98%. Investment income and administrative expenses relating to the Master Trust are allocated to the individual plans based upon average monthly balances invested by each plan.

All investment information disclosed in the accompanying financial statements, including investments held, net appreciation (depreciation) in fair value of investments, interest, dividends and investment expenses, was obtained or derived from information supplied to the Plan Administrator and certified as complete and accurate by U.S. Bank for the years ended December 31, 2025 and 2024.

5. Interest in Barnes Group Inc. Pension Trust (continued)

The following tables present the total assets for the Master Trust and the Plan's interest in the Master Trust:

	December 31, 2025	
	Master Trust Balances	**Plan's Interest in Master Trust Balances**
Cash and short-term investments	**$ 3,492,343**	**$ 3,436,043**
Fixed income securities:		
U.S. bond funds	**318,128,282**	**312,991,123**
Total investments	**321,620,625**	**316,427,166**
Interest receivable	**919,461**	**913,191**
Total Master Trust assets	**$ 322,540,086**	**$ 317,340,357**

	December 31, 2024	
	Master Trust Balances	**Plan's Interest in Master Trust Balances**
Cash and short-term investments	$ 3,491,899	$ 3,431,555
Equity securities:		
U.S. large-cap	34,002,096	33,414,498
U.S. mid-cap	13,718,031	13,480,966
U.S. small-cap	13,693,823	13,457,177
International equities	99,179,075	97,465,139
Global equity	41,068,231	40,358,521
Fixed income securities:		
U.S. bond funds	95,126,055	93,482,162
Total investments	300,279,210	295,090,018
Interest receivable	6,380	6,270
Total Master Trust assets	$ 300,285,590	$ 295,096,288

5. Interest in Barnes Group Inc. Pension Trust (continued)

The following table is a summary of the changes in the Master Trust's assets for the years ended December 31, 2025 and 2024:

	2025	2024
Additions:		
Net appreciation in fair value of investments	**$ 47,227,965**	$ 16,626,028
Interest and dividend income	**995,938**	101,466
Employer contributions	**-**	316,108
Total additions	**48,223,903**	17,043,602
Deductions:		
Benefit payments	**23,158,106**	23,005,591
Transfer of liability to One Equity Partners	**-**	7,646,017
Administrative expenses	**2,811,301**	2,542,591
Total deductions	**25,969,407**	33,194,199
Increase (decrease) in Master Trust assets	**22,254,496**	(16,150,597)
Master Trust assets – beginning of year	**300,285,590**	316,436,187
Master Trust assets – end of year	**$ 322,540,086**	300,285,590
Plan's interest in master trust investment income	**$ 47,416,431**	$ 12,057,468

6. Fair Value Measurements

The following table summarizes the fair values and levels within the fair value hierarchy in which the fair value measurements fall for assets measured on a recurring basis for the Master Trust as of December 31, 2025 and 2024:

2025

	Level 1	**Level 2**	**Level 3**	**Total**
Master Trust Investments:				
Cash and short-term investments	**$ 3,492,343**	**$ -**	**$ -**	**$ 3,492,343**
Fixed income securities:				
U.S. bond funds	**-**	**318,128,282**	**-**	**318,128,282**
Total Master Trust Investments	**$ 3,492,343**	**$ 318,128,282**	**$ -**	**$ 321,620,625**

2024

	Level 1	**Level 2**	**Level 3**	**Total**
Master Trust Investments:				
Cash and short-term investments	$ 3,491,899	$ -	$ -	$ 3,491,899
Equity securities:				
U.S. large-cap	-	34,002,096	-	34,002,096
U.S. mid-cap	13,718,031	-	-	13,718,031
U.S. small-cap	13,693,823	-	-	13,693,823
International equities	-	99,179,075	-	99,179,075
Global equity	41,068,231	-	-	41,068,231
Fixed income securities:				
U.S. bond funds	-	95,126,055	-	95,126,055
Total Master Trust Investments	$ 71,971,984	$ 228,307,226	$ -	$ 300,279,210

The fair values of the Level 1 assets are based on quoted market prices from various financial exchanges. The fair values of the Level 2 assets are based primarily on quoted prices in active markets for similar assets or liabilities. The Level 2 assets are comprised primarily of commingled funds and fixed income securities. Commingled equity funds are valued at their net asset values based on quoted market prices of the underlying assets. Fixed income securities are valued using a market approach which considers observable market data for the underlying asset or securities.

7. Party-in-Interest and Related Parties

During the years ended December 31, 2025 and 2024, there were transactions involving the investment of Plan assets in investment funds maintained by the Plan's Trustee, a party-in-interest as defined in Section 3(14) of ERISA. These party-in-interest transactions are deemed not to be prohibited because they are covered by statutory and administrative exemptions pursuant to the Internal Revenue Code and the rules under ERISA regarding prohibited transactions.

8. Subsequent Events

The Plan has evaluated events occurring between December 31, 2025 and October 8, 2026, the date the financial statements were available to be issued.

During March 2026, the Benefits Committee of Barnes Group Inc. approved the termination of the Plan and the Kar Products Retirement Income Plan. The termination was effective May 31, 2026, and participants had the option to elect either a one-time lump sum payment or the purchase of an annuity through Nationwide Life and Annuity Insurance Company. The final buyout, with Nationwide Life and Annuity Insurance Company fully assuming all future payments, is expected to be complete in February 2027.

Schedule SB, line 26 — Schedule of Active Participant Data

Attained age	Years of credited service										
	Under 1	1–4	5–9	10–14	15–19	20–24	25–29	30–34	35–39	40 & up	Total
Under 25		1									1
25–29				1							1
30–34											
35–39											
40–44	2	1		3	2		1				9
45–49				2	3	3	5	1			14
50–54					3	4	2			1	10
55–59					2	4	4			1	11
60–64				2		4	7	3			16
65–69		1			1		1	1			4
70 & up											
Total	2	3		8	11	15	20	5		2	66

In each cell, the number is the count of active participants for each age/service combination.

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

Actuarial assumptions for January 1, 2025 funding valuation

Discount rate sponsor elections			
• Segment rates or full yield curve	Segment		
• Look-back months	0		
	Stabilized	**Nonstabilized**	**PBGC**
• First 5 years	5.00%	5.00%	4.65%
• Next 15 years	5.27%	5.27%	5.28%
• Over 20 years	5.50%	5.40%	5.63%
Mortality sponsor elections			
• Healthy participants	Section 430(h)(3) prescribed generational annuitant and nonannuitant mortality tables for 2025 plan year funding valuations, in accordance with IRS regulations 1.430(h)(3)-1.		
• Pre-1995 disabilities	Same as healthy		
• Post-1994 disabilities	Former members of the Salaried Retirement Income Plan (De-Sta-Co employees only) – Revenue Ruling 96-7 table for participants who became disabled after 1994. All other participants – Same as healthy.		
417(e) lump sums	Former members of the Salaried Retirement Income Plan (De-Sta-Co employees only) – Liabilities are determined based on the underlying annuity used by the plan to determine the lump sum amount, rather than valuing the lump sum payment. This annuity is valued based on funding interest rates rather than 417(e) rates and current year 417(e) unisex mortality. All other participants – N/A.		
Other economic assumptions			
• Salary increases	N/A		
• Flat-dollar benefit increases	N/A		
• Social Security wage base	N/A		
• Inflation	2.50% per year		
• Expected investment return	7.75% for 2023, 2024 and 2025		
• Annual increase in Medicare supplement (legacy Troy Plan)	1.25% per year		
• Expenses	$1,085,000 added to current year normal cost		
• Incidental death benefit (legacy Hourly Plan)	The lump sum benefit payable upon the death of a retired participant is assumed to be completely offset by the group insurance program.		

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

Demographic assumptions

- Withdrawal — See table of sample rates.
- Disability incidence — Former members of the Salaried Retirement Income Plan De-Sta-Co employees – The 1985 Pension Disability Table for males and females – Class 1. See table of sample rates. 100% of participants becoming disabled are assumed to be eligible for Social Security disability benefits.

  Former members of the Hourly Employees Pension Plan – The 1985 Pension Disability Table for males and females – Class 3. See table of sample rates. 100% of participants becoming disabled are assumed to be eligible for Social Security disability benefits.

  Former members of the Salaried Retirement Income Plan De-Sta-Co employees – None.
- Social Security Benefits — All UAW disabled employees are assumed to be eligible for Social Security Benefits
- Supplementary Medical Insurance Benefits (Part B Medicare) — All employees are enrolled and covered for Supplementary Medical Insurance Benefits (Part B Medicare)
- Retirement age

Retirement Rates

Attained age	Retirement
55 - 58	5.00%
59 - 60	10.00%
61 - 64	20.00%
65-66	30.00%
67-69	25.00%
70 and above	100.00%

- Pre-retirement spouse benefit (legacy Hourly Plan) — All Non-De-Sta-Co terminated vested participants waive coverage
- Benefit commencement age for
  - Future vested deferred

    Former Members of Salaried Retirement Income Plan And Hourly Employees Pension Plan — 63
  - Current vested deferred

    Former Members of Salaried Retirement Income Plan And Hourly Employees Pension Plan — 63

    Former Members of Pension Plan For Hourly Employees- Troy Division — 62

    Former Members of the UAW Agreement and Pension Plan — Except for Saline, Michigan and Bristol participants eligible for plant closing benefits, current terminated vested participants are assumed to commence at the earlier of age 63 with 10 years of vesting service and age

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

	65. For Saline, Michigan or Bristol participants eligible for plant closing benefits, current terminated vested participants are assumed to commence at the later of age 55 or current age.
Former Members of the Pension Plan for Hourly Rate Employees – Milwaukee Division	Earlier of age 63 with 10 years of credited service and age 65

• Spouse assumptions	**Male participants**	**Female participants**	
– Percentage married	80%	60%	
– Spouse age difference	3 years younger	3 years older	
Form of payment — Males	**Lump sum**	**Single life**	**50%/55%/J&S**
Former Members of Salaried Retirement Income Plan, Hourly Employees Pension Plan and Pension Plan For Hourly Employees- Troy Division			
• Active retirements	0%	30%	70%
• Future vested deferred	0%	30%	70%
• Future disabilities	0%	30%	70%
• Future deaths	0%	0%	100%
• Current vested deferred	0%	30%	70%
De-Sta-Co Participants			
• Active participants	100%	0%	0%
Former Members of the UAW Agreement And Pension Plan			
• Current vested deferred	0%	35%	65%
Former Members of the Pension Plan For Hourly Rate Employees – Milwaukee Division			
• Current vested deferred	0%	50%	50%
Form of payment — Females	**Lump sum**	**Single life**	**50%/55% J&S**
Former Members of Salaried Retirement Income Plan, Hourly Employees Pension Plan and Pension Plan For Hourly Employees- Troy Division			
• Active retirements	0%	65%	35%
• Future vested deferred	0%	65%	35%
• Future disabilities	0%	65%	35%
• Future deaths	0%	0%	100%
• Current vested deferred	0%	65%	35%
De-Sta-Co Participants			
• Active retirements	100%	0%	0%

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

Former Members of the UAW Agreement And Pension Plan			
• Current vested deferred	0%	50%	50%
Former Members of the Pension Plan For Hourly Rate Employees – Milwaukee Division			
• Current vested deferred	0%	50%	50%

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

Table of sample rates

Former Salaried Income Retirement Plan (De-Sta-Co employees)		
	Rate	
	Disability Incidence	
Attained age	Male	Female
20	0.029%	0.030%
25	0.038%	0.047%
30	0.048%	0.080%
35	0.069%	0.136%
40	0.117%	0.211%
45	0.202%	0.323%
50	0.358%	0.533%
55	0.722%	0.952%
60	1.256%	1.159%
65	1.753%	1.358%
69	2.180%	1.664%

Former Hourly Employees Pension Plan		
	Rate	
	Disability Incidence	
Attained age	Male	Female
20	0.151%	0.089%
25	0.219%	0.150%
30	0.309%	0.252%
35	0.431%	0.388%
40	0.597%	0.547%
45	0.829%	0.777%
50	1.224%	1.200%
55	2.118%	1.962%
60	3.240%	2.326%
65	4.369%	2.718%

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

Withdrawal			
Ultimate		Select	
Age	Rate	Service	Rate
20	20.00%	0	35.00%
25	20.00%	1	35.00%
30	15.00%	2	20.00%
35	12.50%	3	20.00%
40	10.00%	4	15.00%
45	7.50%		
50	5.00%		
55+	10.00%		

Rationale for non-prescribed economic assumptions

- The **inflation assumption** is based on the inflation assumption published by Mercer Investment Consulting in their Capital Markets Outlook.
- The **expected return assumption** for funding purposes was developed based on a combination of historical and forward-looking assumptions reflecting the plan's current target investment portfolio and Mercer Investment Consulting's Capital Market Outlook assumptions as of October 1, 2024, and reflecting +0.43% incremental return for active portfolio management.
- The **expense assumption** is based on recent historical experience, adjusted to reflect the current year's expected PBGC premiums.

Rationale for non-prescribed demographic actuarial assumptions having a significant effect on the measurement

- The **retirement** and **withdrawal** rates are based on an experience study completed in 2021 using data from 2016 through 2020 and the expectation that the future patterns and circumstances of the employer will not differ significantly from the period studied. The experience during 2020 was excluded from the study as it was deemed unrepresentative of future anticipated experience.
- Since Barnes' active population was not large enough for a credible experience study of disability incidence, the **disability incidence** table is based on the Conference of Consulting Actuaries' 1985 Pension Disability Study Class 1 and Class 3 rates (where applicable), consistent with the nature of the plan's workforce.

- The **benefit commencement age** for terminated vested participants is based on an experience study completed in 2021 using data from 2016 through 2020 and the expectation that the future patterns will not differ significantly from the period studied.
- Because the employer does not have enough credible experience to analyze spousal demographics, the assumptions regarding percent **married/spouse age difference** are based on the actuary's experience with many plans and discussions with the plan sponsor.
- The **form of payment** assumptions are based on an experience study completed in 2021 using data from 2016 through 2020 and the expectation that the future patterns will not differ significantly from the period studied.

Actuarial methods for funding

Asset methods– Effective January 1, 2009

The asset valuation method is an average of the adjusted market value over the last 24 months preceding the valuation date using annual determination dates. The adjusted market value is the market value at each determination date adjusted to the valuation date based on actual cash flows and expected interest at the lesser of the expected rate of return and the third segment rate. This amount is adjusted to be no greater than 110 percent and no less than 90 percent of the fair market value, as defined in IRC Section 430.

A characteristic of this asset method is that, over time, it is slightly more likely to produce an actuarial value of assets that is less than the market value of assets than an actuarial value that is greater than the market value.

Participant methods – Effective January 1, 2008

Participants or former participants are included or excluded from the valuation as described below:

- **Participants included:** The plan sponsor provides us with data on all employees as of the valuation date, but only those employees who have completed the plan's eligibility requirements are included in the valuation of liabilities.
- **Participants excluded:** No actuarial liability is included for nonvested participants who terminated prior to the valuation date. For this purpose, participants with a break-in-service on the valuation date are treated as terminated participants.
- **Insurance contracts**: The plan does not have any insurance contracts.

Minimum funding methods – Effective January 1, 2010

The funding target for minimum funding calculations is computed using the traditional unit credit method of funding. The objective under this method is to fund each participant's benefits under the plan as they accrue. Thus, the total pension to which each participant is expected to become entitled at retirement is broken down into units, each associated with a year of past or future credited service.

A detailed description of the calculation follows:

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

- The plan's valuation date is the beginning of the plan year.
- An individual's **funding target** is the present value of future benefits based on credited service and average pay as of the beginning of the plan year, and an individual's **target normal cost** is the present value of the benefit expected to accrue in the plan year. If multiple decrements are used, the funding target and the target normal cost for an individual are the sum of the component funding targets and target normal costs associated with the various anticipated separation dates.
- This plan provides disability benefits that are only partially based on a participant's accrued benefit or years of service. This benefit is allocated to funding target based on the accrued benefit on the valuation date plus a portion of the excess of the benefit over the accrued benefit multiplied by the ratio of the participant's service at the beginning of the plan year to their service at each decrement age. This benefit is allocated to target normal cost based on the proportionate benefit attributable to the increase in the participant's service and compensation during the plan year.
- This plan provides benefits that are not a function of a participant's accrued benefit or years of service. This benefit is allocated to funding target based on the ratio of the participant's service at the beginning of the plan year to their service at each decrement age and is allocated to target normal cost based on the proportionate benefit attributable to the increase in the participant's service during the plan year.
- The plan's **target normal cost** is the sum of the individual target normal costs, and the plan's **funding target** is the sum of the individual funding targets for all participants under the plan.

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

2025

This Form is Open to Public Inspection

For calendar plan year 2025 or fiscal plan year beginning 01/01/2025 and ending 12/31/2025

▶ **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
BARNES GROUP INC. CONSOLIDATED PENSION PLAN

B Three-digit plan number (PN) ▶ 002

C Plan sponsor's name as shown on line 2a of Form 5500 or 5500-SF
BARNES GROUP INC.

D Employer Identification Number (EIN)
06-0247840

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

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

Part I Basic Information

1 Enter the valuation date: Month 01 Day 01 Year 2025

2 Assets:

a Market value	**2a**	295,096,288
b Actuarial value	**2b**	289,477,600

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	2,261	214,918,680	214,918,680
b For terminated vested participants	776	45,136,703	45,136,703
c For active participants	66	18,157,571	18,768,708
d Total	3,103	278,212,954	278,824,091

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

a Funding target disregarding prescribed at-risk assumptions	**4a**	
b Funding target reflecting at-risk assumptions, but disregarding transition rule for plans that have been in at-risk status for fewer than five consecutive years and disregarding loading factor	**4b**	
5 Effective interest rate	**5**	5.32%
6 Target normal cost		
a Present value of current plan year accruals	**6a**	0
b Expected plan-related expenses	**6b**	1,085,000
c Target normal cost	**6c**	1,085,000

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 Tim DiIulio TJD

Signature of actuary

10/06/2026
Date

TIMOTHY J. DIIULIO, F.S.A.
Type or print name of actuary

2607805
Most recent enrollment number

MARSH
Firm name

212-345-8680
Telephone number (including area code)

99 HIGH STREET
BOSTON MA 02110-2320
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)	5,814,394	9,254,533
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)	5,814,394	9,254,533
10	Interest on line 9 using prior year's actual return of 5.22 %	307,387	484,178
11	Prior year's excess contributions to be added to prefunding balance:		
	a Present value of excess contributions (line 38a from prior year)		0
	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 5.16 %		0
	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		0
	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)	6,121,781	9,738,711

Part III Funding Percentages

14	Funding target attainment percentage	14	99.75 %
15	Adjusted funding target attainment percentage	15	103.82 %
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	106.67 %
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
			Totals ► 18(b)	0	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	0

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: 5.00 %	2nd segment: 5.27 %	3rd segment: 5.50%	☐ N/A, full yield curve used

b Applicable month (enter code)	**21b**	0
22 Weighted average retirement age	**22**	62

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

Part VI Miscellaneous Items

24 Has a change been made in the non-prescribed actuarial assumptions for the current plan year? If "Yes," see instructions regarding required attachment. ☒ Yes ☐ No

25 Has a method change been made for the current plan year? If "Yes," see instructions regarding required attachment. ☐ Yes ☒ No

26 Demographic and benefit information

a Is the plan required to provide a Schedule of Active Participants? If "Yes," see instructions regarding required attachment. ☒ Yes ☐ No

b Is the plan required to provide a projection of expected benefit payments? If "Yes," see instructions regarding required attachment ☒ Yes ☐ No

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

Part VII Reconciliation of Unpaid Minimum Required Contributions For Prior Years

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

Part VIII Minimum Required Contribution For Current Year

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

a Target normal cost (line 6c)	**31a**	1,085,000
b Excess assets, if applicable, but not greater than line 31a	**31b**	0

32 Amortization installments:

	Outstanding Balance	Installment
a Net shortfall amortization installment	10,448	1,155
b Waiver amortization installment	0	0

33 If a waiver has been approved for this plan year, enter the date of the ruling letter granting the approval (Month _____ Day _____ Year _____) and the waived amount	**33**	
34 Total funding requirement before reflecting carryover/prefunding balances (lines 31a - 31b + 32a + 32b - 33)	**34**	1,086,155

	Carryover balance	Prefunding balance	Total balance
35 Balances elected for use to offset funding requirement	1,086,155		1,086,155

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

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

a Total (excess, if any, of line 37 over line 36)	**38a**	0
b Portion included in line 38a attributable to use of prefunding and funding standard carryover balances	**38b**	
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. ☐ 2019 ☐ 2020 ☒ 2021

Schedule SB, Part II, Line 13 — Explanation of Credit Balance Discrepancy

The UAW Agreement Pension Plan ("UAW Plan") and the Pension Plan for Hourly Employees – Milwaukee Division ("Milwaukee Plan") merged into the Consolidated Pension Plan effective December 31, 2024.

The tables below show the prefunding balance for items 7 – 13 for each plan separately, as well as the total amounts for the plan after the merge. Note that the total 'actual return' percentage is displayed to two decimal places in the Schedule SB.

Carryover Balance

Schedule SB item	Consolidated Pension Plan (06-0247840/002)	UAW Plan (06-0247840/001)	Pension Plan for Hourly Employees – Milwaukee Division (06-0247840/004)	Total
7	$1,508,520	$4,305,874	$0	$5,814,394
8	0	0	0	0
9	1,508,520	4,305,874	0	5,814,394
(actual return)	5.22%	5.31%	5.86%	5.29%
10	78,745	228,642	0	307,387
11	0	0	0	0
12	0	0	0	0
13	$1,587,265	$4,534,516	$0	$6,121,781

Prefunding Balance

Schedule SB item	Consolidated Pension Plan (06-0247840/002)	UAW Agreement and Pension Plan (06-0247840/001)	Pension Plan for Hourly Employees – Milwaukee Division (06-0247840/004)	Total
7	$8,140,383	$1,097,978	$91,126	$9,329,487
8	0	0	(74,954)	(74,954)
9	8,140,383	1,097,978	16,172	9,254,533
(actual return)	5.22%	5.31%	5.86%	5.23%
10	424,928	58,302	948	484,178
11	0	0	0	0
12	0	0	0	0
13	$8,565,311	$1,156,280	$17,120	$9,738,711

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

Each employee is assumed to retire in accordance with the table of retirement rates. The proportion of employees expected to retire at each potential retirement age is shown below. The average retirement age is 62.

(A) Retirement age	(B) Retirement percent	(C) Lx	(D) Number of employees expected to retire (B) x (C)	(E) (A) x (D)
55	5.0%	10,000	500.00	27,500
56	5.0%	9,500	475.00	26,600
57	5.0%	9,025	451.25	25,721
58	5.0%	8,574	428.69	24,864
59	10.0%	8,145	814.51	48,056
60	10.0%	7,331	733.06	43,984
61	20.0%	6,597	1,319.50	84,490
62	20.0%	5,278	1,055.60	65,447
63	20.0%	4,222	844.48	53,202
64	20.0%	3,378	675.58	43,237
65	30.0%	2,702	810.70	52,696
66	30.0%	1,892	567.49	37,454
67	25.0%	1,324	331.04	22,180
68	25.0%	993	248.28	16,883
69	25.0%	745	186.21	12,848
70	100.0%	559	558.61	39,103
Total			10,000.00	620,265
Average				62.03

Schedule SB, Part V — Summary of Plan Provisions

Summary of major plan provisions for former members of the Salaried Retirement Income plan

Plan name	Barnes Group Inc. Consolidated Pension Plan
EIN/Plan number	06-0247840 / 002
Effective date and plan year	Original plan: January 1, 1976 Restated plan: January 1, 2025 Plan year: calendar year
Status of the plan	Effective December 31, 2023, the plan is frozen to all future accruals and all active participants fully vest in their Accrued Benefit as of such date. Effective January 1, 2013 the plan has been closed to new and rehired participants.
Significant events	The UAW Agreement Pension Plan and Pension Plan for Hourly Rate Employees - Milwaukee Division Plan merged into the CPP effective December 31, 2024
Definitions	
• Covered employees	Any person engaged in rendering personal services to the Employer for earnings considered wages, but not compensated on an hourly rate or commission basis or a member of a collective bargaining unit, unless the members of such unit are eligible to become Participants pursuant to a collective bargaining agreement.
• Participation	Immediately.
• Credited service	All years of service with the Employer from date of employment to early retirement, termination of employment, or normal retirement, calculated using full years and months of service. Credited service is frozen effective December 31, 2023.
• Pensionable earnings	Basic earnings with a maximum of the IRC §401(a)(17) compensation limit for the applicable calendar year (as indexed), excluding bonus, overtime, etc. Earnings after December 31, 2023 will not be considered in the benefit determination.
• Final average earnings	Highest average compensation during any 60 consecutive months within the last 10 years prior to normal retirement date, termination or death.
• Covered Compensation	Average of the 35 years of Social Security Taxable Wage Base ending with the year the participant attains Social Security Retirement Age. The Covered Compensation amount will be frozen effective December 31, 2023.
Normal retirement	
• Eligibility	The first day of the month coinciding with or next following the Participant's 65th birthday.
• Benefit	the sum of (a), (b) and (c) below where: (a) is equal to: (i) 1.85% of the Participant's Highest Average Earnings up to Covered Compensation, multiplied by Credited Service completed prior to January 1, 2007, not in excess of 25; plus (ii) 2.45% of the Participant's Highest Average Earnings in excess of Covered Compensation, multiplied by Credited Service completed prior to January 1, 2007, not in excess of 25. (b) is equal to:

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	(i) 1.50% of the Participant's Highest Average Earnings up to Covered Compensation, multiplied by Credited Service completed after December 31, 2006, not in excess of 25 reduced by the amount of Credited Service completed prior to January 1, 2007, plus (ii) 2.00% of the Participant's Highest Average Earnings in excess of Covered Compensation, multiplied by Credited Service completed after December 31, 2006, not in excess of 25 reduced by the amount of Credited Service completed prior to January 1, 2007; (c) is equal to .5% of the Participant's Highest Average Earnings multiplied by Credit Service completed in excess of 25.
Early retirement	
• Eligibility	Effective October 1, 2000, age 55 with 10 years of service. Effective January 1, 2023, for all persons who were Employees on or after January 1, 2023, age 54 with 10 years of service.
• Benefit	Normal retirement benefit accrued to early retirement, reduced based on the number of months retirement date precedes age 62. The reduction factors at integer ages are: **Age Factor** 55 62.50% 56 66.60% 57 70.80% 58 75.00% 59 79.10% 60 83.30% 61 91.60% 62 100.00%
Deferred vested	
• Eligibility	Termination of employment with at least five years of service.
• Benefit	The amount of benefit should be calculated as for Normal Retirement. An employee's deferred vested benefit shall commence in full on his or her normal retirement date, or at the Participant's option, in an actuarially reduced benefit prior to normal retirement any time after attaining age 55. Factors for reducing benefit from 65 are: Age Factor 55 42.30% 56 45.70% 57 49.40% 58 53.60% 59 58.20% 60 63.30% 61 69.00% 62 75.40% 63 82.60% 64 90.70%
Pre-retirement death	
• Eligibility	Vested under the plan and dies prior to commencement of benefit payments.

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• Benefit	The amount of the pre-retirement survivor annuity benefits payable shall equal the amount of payments that would have been made to a spouse under the Joint & 50% Survivor option if: (i) in the case of an eligible Participant who dies on or before the earliest retirement age under the Plan, the Participant had (a) separated from service on the date of death, (b) survived to the earliest retirement age, (c) retired with an immediate Joint & 50% Survivor option at the earliest retirement age, and (d) died on the day after the day on which he/she would have attained the earliest retirement age. (ii) in the case of an eligible Participant who dies after attaining retirement age under the Plan, the Participant had retired with an immediate Joint & 50% Survivor option on the day before his/her death.
• Cost	For each month and part thereof that the pre-retirement survivor annuity coverage is in effect after the Participant has terminated employment, a reduction will be made in the Participant's basic retirement income as follows: (i) 1/60 of 1% for each full or partial month of coverage for the months ending prior to the Participant's 45th birthday; and (ii) 1/24 of 1% for each full or partial month of coverage for the months ending after the Participant's 45th birthday.
Form of benefits	
• Automatic form for unmarried participants	If Participant either has no spouse as of his/her retirement date or elects to receive his/her income under the normal form, retirement income will be the amount determined as the normal retirement benefit and paid as a single life annuity.
• Automatic form for married participants	If Participant has a spouse as of his/her retirement date and does not elect otherwise, retirement income shall be paid on the basis of Joint and Survivor form, as stipulated by ERISA, and will be the amount determined as the normal retirement benefit multiplied by the appropriate factor.
• Optional forms	The forms of benefit payment available to each Participant shall be the actuarial equivalent of his/her basic Normal Retirement benefit on a straight life annuity basis. The forms of benefit are as follows: (a) Straight Life Annuity (b) Contingent Pensioner Option (25%, 33 1/3%, 50%, 66 2/3%, 75%, or 100%) (c) 120 Months Certain and Life Income Option (d) Level Income Option (e) Level Income and the Contingent Pensioner Option (25%, 50%, 75%, or 100%)
• Optional form conversion factors	Amount of an alternative form of benefit (other than a lump sum) which has a value equivalent to the benefit or benefits otherwise payable under the plan, computed as follows: (a) A 6% interest assumption and a mortality assumption according to the RP2000 Mortality Tables for Males and Females with a weighting of 50% males and 50% females projected to 2010 (b) Level Income Option / Level Income and the Contingent Pensioner Option: IRC §417(e) assumptions

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Plan Provisions – Former De-Sta-Co Participants

Effective date and plan year	Original plan: January 1, 1976 Restated plan: January 1, 2011 Plan year: calendar year
Status of the plan	Effective December 31, 2023, the plan is frozen to all future accruals and all active participants fully vest in their Accrued Benefit as of such date. Effective January 1, 2013 the plan has been closed to new and rehired participants.
Significant events that occurred during the year	None.
Definitions	
• Covered employees	All salaried employees of De-Sta-Co Manufacturing.
• Participation	Participants as of December 31, 1992 shall continue to participate. All other employees participate first of the month coincident or next following age 21 and 1 year of service.
• Vesting service	One year for each 1,000-hour calendar year of employment excluding plan years prior to attaining age 18.
• Credited service	Prior to January 1, 1976 – Years and complete months of service excluding service prior to attaining age 21. The maximum service credited to a participant is 35 years. After December 31, 1975 – One year for each calendar year of employment that hours worked are greater than 50 times the number of hours constituting a full work week. (If hours are less than this amount then one tenth year of benefit service for each 5 full time weeks). Benefit service excludes service prior to age 21 and for employees hired after age 60, service prior to 1988. The maximum service credited to a participant is 35 years. Credited service is frozen effective December 31, 2023.
• Pensionable earnings	Prior to January 1, 2003- Base compensation plus 50% of bonus, overtime, commissions, etc. For employees active on July 1, 2003- Base compensation plus 100% of bonus, overtime, commissions, etc. Earnings after December 31, 2023 will not be considered in the benefit determination.
• Final average earnings	Highest average compensation during any 60 consecutive months within the last 10 years prior to normal retirement date, termination or death.
• Social security integration level	158% of the average of the 35 most recent Social Security Taxable Wage Bases. The integration level will be frozen effective December 31, 2023.
Normal retirement	
• Eligibility	The first day of the month coinciding with or next following the Participant's 65th birthday.

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• Benefit	One twelfth of 1.5% of Highest Average Earnings multiplied by years of Credited Service up to 35 years reduced by 0.5% of Highest Average Earnings up to the Social Security Integration Level in effect at determination multiplied by years of Credited Service up to 35 years. In no event shall the monthly pension benefit be less than the December 31, 1992 (December 31, 1988 if a Super Highly Compensated Employee in 1988) grandfather accrued benefit.
Early retirement	
• Eligibility	Prior to January 1, 2023, retirement before normal retirement date and on or after both attaining age 55 and completing 15 years of Vesting Service Effective January 1, 2023, for all persons who were Employees on or after January 1, 2023, retirement before normal retirement date and on or after both attaining age 54 and completing 15 years of Vesting Service
• Benefit	Monthly pension benefit determined as of early retirement date, reduced by 1/180th for each of the first 60 months and by 1/360th for each of the next 60 months of payment prior to normal retirement date. The Tranter grandfathered benefit is unreduced at 62 and 10 years of service.
Late retirement	
• Eligibility	Retirement after normal retirement date.
• Benefit	Monthly pension benefit determined as of actual retirement date.
Deferred vested	
• Eligibility	Termination of employment with at least five years of Vesting Service.
• Benefit	Monthly pension benefit determined as of termination date, with early retirement reductions for payments prior to age 65 (as described under early retirement above). Payments prior to age 55 are reduced on an actuarial basis.
Disability	
• Eligibility	Retirement at normal retirement date after becoming permanently disabled, as determined by qualifying for the company's LTD program.
• Benefit	Monthly pension benefit payable at age 65 or the cessation of LTD assuming Credited Service and Vesting Service increases while disabled and pay remains level. Benefits, payable prior to age 65, are reduced.
Pre-retirement death	
• Eligibility	Vested under the plan and dies prior to commencement of benefit payments
• Benefit	Monthly preretirement spouse benefit is payable at the later of the participant's early retirement date or the Participant's date of death and is equal to 50% of the monthly pension benefit as of the date of death reduced for the 50% joint and survivor election and reduced for payment as early as the participant's early retirement date.
Form of benefits	
• Automatic form for unmarried participants	If Participant either has no spouse as of his/her retirement date or elects to receive his/her income under the normal form, retirement income will be the amount determined as the normal retirement benefit and paid as a single life annuity.

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• Automatic form for married participants	If Participant has a spouse as of his/her retirement date and does not elect otherwise, retirement income shall be paid on the basis of Joint and Survivor form, as stipulated by ERISA, and will be the amount determined as the normal retirement benefit multiplied by the appropriate factor.
• Optional forms	The forms of benefit payment available to each Participant shall be the actuarial equivalent of his/her basic Normal Retirement benefit on a straight life annuity basis. The forms of benefit are as follows: (a) Straight Life Annuity (b) 75% and 100% Contingent Pensioner Options (c) 60 Months Certain and Life Income Option (d) 120 Months Certain and Life Income Option (e) Lump sum distribution of the full amount payable
• Optional form conversion factors	Amount of an alternative form of benefit (other than a lump sum) which has a value equivalent to the benefit or benefits otherwise payable under the plan, computed on the more generous of the following basis: a) A 6% interest assumption and a mortality assumption according to the RP2000 Mortality Tables for Males and Females with a weighting of 50% males and 50% females projected to 2010. b) The flat rate reductions in effect prior to October 1, 2011 applied to the frozen benefit accrued to September 30, 2011.
Miscellaneous	
• Maximum compensation	Compensation for any 12-month period used to determine accrued benefits may not exceed the limits in IRC §401(a)(17) for the calendar year in which the 12-month period begins. This limit is indexed annually. Earnings after December 31, 2023 will not be considered in the benefit determination.
• Maximum benefits	Annual benefits may not exceed the limits in IRC §415. This limit is indexed annually. For 2025, the limit is $280,000.

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Summary of Major Plan Provisions for Former Members of the Hourly Employees Pension Plan

Plan name (before merger)	Barnes Group Inc. Non-Union Hourly Employees' Pension Plan
EIN/plan number (before merger)	06-0247840 / 005
Effective date and plan year	Original plan: December 1, 1975 Restated plan: January 1, 2016 Plan year: calendar year
Status of the plan	Effective December 31, 2023, the plan is frozen to all future accruals and all active participants fully vest in their Accrued Benefit as of such date. Effective December 31, 2023, the plan has been closed to new and rehired participants.
Significant events that occurred during the year	None.
Definitions	
• Covered employees	Any person engaged in rendering personal services to the employer for earnings considered wages, compensated on an hourly basis.
• Participation	First day of the month coincident with or otherwise next following one year of service.
• Vesting Service	All years of service with the employer from date of employment to the earliest of termination, retirement or death. For vesting purposes, 1,000 hours equals one year.
• Credited Service	All years of service with the employer from date of employment to early retirement, termination of employment, or normal retirement. 1,700 hours equal one year with pro rata credit for fewer than 1,700 hours. Credited Service is frozen effective December 31, 2023.
• Pensionable earnings	Basic earnings with a maximum of the IRC §401(a)(17) compensation limit for the applicable calendar year (as indexed), excluding bonus, overtime pay, severance payments made after the date of the Participant's termination of employment, director's fees, reimbursement of expenses and other additional forms of earnings including contributions made by the Employer to or under any form of employee benefit program. Earnings after December 31, 2023 will not be considered in the benefit determination.
• Highest average earnings	Final average earnings during any 60 consecutive months within the last 10 years prior to normal retirement date, termination or death.
Normal retirement	
• Eligibility	The first day of the month coinciding with or next following the later of Participant's 65th birthday or 5th anniversary of a Participant's commencement of participation in the plan.

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• Benefit	Monthly benefit equal to the greater of A or B: A. The sum of (i) plus (ii) plus (iii) where: i. equals 30% Highest Average Earnings, reduced pro rata for less than 25 years of Credited Service; ii. equals 0.5% of the Highest Average Earnings multiplied by years of Credited Service over 25 years; iii. equals 3% of the total of (i) plus (ii) above times the Participant's full years of employment after age 62. B. The sum of (i) plus (ii) plus (iii) assuming service until age 65, multiplied by the ratio of actual service to projected service at age 65. (i) equals 30% Highest Average Earnings, reduced pro rata for less than 25 years of Credited Service; (ii) equals 0.5% of the Highest Average Earnings multiplied by years of Credited Service over 25 years; (iii) equals 3% of the total of (i) plus (ii) above times the Participant's full years of employment after age 62.
Early retirement	
• Eligibility	Prior to January 1, 2023, age 55 with 10 years of Vesting Service. Effective January 1, 2023, for all persons who were Employees on or after January 1, 2023, age 54 with 10 years of Vesting Service.
• Benefit	Normal retirement benefit accrued to early retirement, reduced by 0.4% for each full month that early retirement date precedes age 65. There is no reduction if the Participant has attained age 62 on his/her termination date. The reduction factors at integer ages are: **Age** **Factor** 55 52.00% 56 56.80% 57 61.60% 58 66.40% 59 71.20% 60 76.00% 61 80.80% 62 85.60% 63 90.40% 64 95.20%
Deferred vested	
• Eligibility	Termination of employment with at least five years of Vesting Service.
• Benefit	The amount of benefit should be calculated as for Normal Retirement under section B only. An employee's deferred vested benefit shall commence in full on his or her normal retirement date, or at the Participant's option, in a reduced benefit prior to normal retirement any time after attaining age 55 with 5 years of Vesting Service, with the reduction as follows:

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	Age **Factor** 55 42.3% 56 45.7% 57 49.4% 58 53.6% 59 58.2% 60 63.7% 61 69.0% 62 75.4% 63 82.6% 64 90.7%
Disability	
• Eligibility	Total and permanent disability while actively employed prior to normal retirement date.
• Benefit	Monthly benefit of 40% of the Final Average Earnings, less 50% of Primary Social Security benefit, and 100% of Workmen's Compensation for which the Participant is eligible and is actually receiving.
Pre-retirement death	
• Eligibility	Vested under the plan and dies prior to commencement of benefit payments.
• Benefit	The amount of the pre-retirement survivor annuity benefits payable shall equal the amount of payments that would have been made to a spouse under the 50% Joint & Survivor option if: (i) in the case of an eligible Participant who dies after attaining retirement age, the Participant had retired with an immediate 50% Joint & Survivor option on the day before his/her death, or (ii) in the case of an eligible Participant who dies on or before the earliest retirement age, the Participant had (a) separated from service on the date of death, (b) survived to the earliest retirement age, (c) retired with an immediate 50% Joint & Survivor option at the earliest retirement age, and (d) died on the day after the day on which he/she would have attained the earliest retirement age.
• Cost	For each month and part thereof that the pre-retirement survivor annuity coverage is in effect after the Participant has terminated employment, a reduction will be made to the Participant's retirement income as follows: (ii) 1/60 of 1% for each full or partial month of coverage for the months ending prior to the Participant's 45th birthday; and (ii) 1/24 of 1% for each full or partial month of coverage for the months ending after the Participant's 45th birthday.
Form of benefits	
• Automatic form for unmarried participants	If Participant either has no spouse as of his/her retirement date or elects to receive his/her income under the normal form, retirement income will be the amount determined as the normal retirement benefit and paid as a single life annuity.

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• Automatic form for married participants	Retirement income shall be paid on the basis of Joint and Survivor form, as stipulated by ERISA, and will be the amount determined as the normal retirement benefit multiplied by 95% plus if the age differential is greater than five years, ½% for each year in excess of five the spouse is older and minus ½% for each year in excess of five the spouse is younger.
• Optional forms	The forms of benefit payment available to each Participant shall be the actuarial equivalent of his/her basic normal retirement benefit on a straight life annuity basis. The forms of benefit are as follows: (a) Straight Life Annuity (b) Contingent Pensioner Option (50%, 75%, or 100%) (c) 120 Months Certain and Life Income Option (d) Social Security Adjustment Option
• Optional form conversion factors	Amount of an alternative form of benefit (other than a lump sum) which has a value equivalent to the benefit or benefits otherwise payable under the plan, computed on the following basis: (a) 50% Joint and Survivor Option and spouse is the beneficiary: a 5% reduction plus/minus 1/2% for each year or part of a year where the spouse is more than 5 years younger/older than the participant. (b) Social Security Adjustment Option: IRC §417(e) assumptions (c) All other optional forms of payment: a 6% interest assumption and a mortality assumption according to the RP2000 Mortality Tables for Males and Females with a weighting of 50% males and 50% females projected to 2010.
Miscellaneous	
• Maximum compensation	Compensation for any 12-month period used to determine accrued benefits may not exceed the limits in IRC §401(a)(17) for the calendar year in which the 12-month period begins. This limit is indexed annually.
• Maximum benefits	Annual benefits may not exceed the limits in IRC §415. This limit is indexed annually. For 2025, the limit is $280,000.

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Plan Provisions Former Bowman Plan

Effective date and plan year	Original plan: May 1, 1967 Plan year: calendar year
Status of the plan	As of July 1, 1996, pension accruals for the Bowman plan have ceased. All covered employees are assumed to be 100% vested. As of June 15, 1995, pension accruals for employees of the Curtis plan have ceased. All covered employees are assumed to be 100% vested. Effective December 31, 2023, the plan is closed to new hires and rehired participants and all benefit accruals are frozen.
Significant events that occurred during the year	None
Definitions	
• Covered employees	Any person who was covered under the prior plan on December 31, 1998.
• Participation	Each person who became an employee prior to July 1, 1996 who has an hour of service prior to July 1, 1996.
• Vesting service	Whole years and full months of continuous employment commencing on date of employment and ending on the earliest of termination, retirement or death. 1,000 hours equal one year of Service for vesting purposes, with pro rata credit for fewer than 1,000 hours.
• Credited service	Any calendar year in which the employee has 1,700 hours, or more hours of service shall be counted a full year of Credited Service. Where hours of service are fewer than 1,700 hours, credit shall be given to the nearest 1/10 of a year.
Normal retirement	
• Eligibility	On and after January 1, 1990, a participant who has attained the later of his/her 65th birthday and the 5th anniversary of his/her employment date.
• Benefit	Monthly benefit for each year of Credited Service is calculated based on the following schedule:

Effective Dates	Monthly Benefit Multiplier
Retirement on or after May 1, 1994 and prior to May 1, 1995	$16.00
Retirement on or after May 1, 1995 and prior to May 1, 1996	$16.50
Retirement on or after May 1, 1996	$17.00

Curtis – $11.00 monthly per year of service, except $8.00 for participants hired after April 4, 1984

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Early retirement

- Eligibility

Age 55 with 10 years of Vesting Service.

- Benefit

Unreduced early retirement at age 62. If the employee retires before age 62, then the monthly benefit is reduced according to the following table of factors:

Age When Pension Commences	Applicable Percentage
62	100.0%
61	93.3%
60	86.7%
59	79.0%
58	72.2%
57	66.2%
56	60.7%
55	55.8%

Deferred vested

- Eligibility

Termination of employment with at least 5 years of Vesting Service. Any Participant who was an employee on July 1, 1996, including those employees who were on a layoff status as of July 1, 1996, will be treated as being 100% vested in the pension accrued through the date of his/her termination of employment.

- Benefit

The amount of benefit should be calculated according to the following schedule:

If such break in seniority occurs on or after May 1, 1994 but prior to May 1, 1995:	$16.00 for each year of Credited Service to the date he/she ceases to be an employee
If such break in seniority occurs on or after May 1, 1995 but prior to May 1, 1996:	$16.50 for each year of Credited Service to the date he/she ceases to be an employee
If such break in seniority occurs on or after May 1, 1996:	$17.00 for each year of Credited Service to the date he/she ceases to be an employee

Disability

- Eligibility

10 years of Vesting Service if the employee is deemed totally and permanently disabled. The Plan Administrator shall have the discretion to determine disability under the plan.

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• Benefit	The monthly disability benefit payable to the Participant is determined from the following schedule: **Effective Dates** — **Monthly Benefit Multiplier** Retirement on or after May 1, 1994 and prior to May 1, 1995 — $32.00 Retirement on or after May 1, 1995 and prior to May 1, 1996 — $33.00 Retirement on or after May 1, 1996 — $34.00 The monthly pension payable to such a disabled Participant who retires on or after May 1, 1994 will be increased by $1.00 for each year of Credited Service on each May 1 thereafter until a monthly maximum pension of $34.00 per year of Credited Service is reached.
Pre-retirement death	
• Eligibility	Surviving spouse of vested employee.
• Benefit	The pre-retirement surviving spouse pension is equal to the amount of payments that would have been made to a spouse if: a) in the case of a Participant who dies after attaining retirement age, the Participant had retired with an immediate surviving spouse option on the day before his/her death, or b) in the case of a Participant who dies on or before the earliest retirement age, the Participant had: a) separated from service on the date of death (unless already separated from service). b) survived to the earliest retirement age, c) retired with an immediate surviving spouse option at the earliest retirement age, and d) died on the day after the day on which he/she would have attained the earliest retirement age.
• Cost	For each month and part thereof that the pre-retirement survivor annuity coverage is in effect after the Participant has terminated employment, a reduction will be made to the Participant's retirement income as follows: (i) 1/60 of 1% for each full or partial month of coverage for the months ending prior to the Participant's 45th birthday; and (ii) 1/24 of 1% for each full or partial month of coverage for the months ending after the Participant's 45th birthday.

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Form of benefits	
• Automatic form for unmarried participants	If Participant either has no spouse as of his/her retirement date or elects to receive his/her income under the normal form, retirement income will be the amount determined as the normal retirement benefit and paid as a single life annuity.
• Automatic form for married participants	Retirement income shall be paid on the basis of Joint and Survivor form, as stipulated by ERISA, and will be the amount determined under the benefit formula multiplied by 95% plus if the age differential is greater than five years, ½% for each year in excess of five the spouse is older and minus ½% for each year in excess of five the spouse is younger.
• Optional forms	The forms of benefit payment available to each Participant shall be the actuarial equivalent of his/her basic Normal Retirement benefit on a straight life annuity basis. The forms of benefit are as follows: (a) Straight Life Annuity (b) Contingent Survivor Option (50% or 75%) (c) 120 Months Certain and Life Income Option (d) Social Security Option
• Optional form conversion forms	Bowman Employees: Amount of an alternative form of benefit (other than a lump sum) which has a value equivalent to the benefit or benefits otherwise payable under the plan, computed on the more generous of the following basis: 1) A 6% interest assumption and a mortality assumption according to the RP2000 Mortality Tables for Males and Females with a weighting of 50% males and 50% females projected to 2010. 2) The flat rate reductions in effect prior to October 1, 2011 applied to the frozen benefit accrued to September 30, 2011. Curtis Employees: Amount of an alternative form of benefit (other than a lump sum) which has a value equivalent to the benefit or benefits otherwise payable under the plan, computed with a 6% interest assumption and a mortality assumption according to the RP2000 Mortality Tables for Males and Females with a weighting of 50% males and 50% females projected to 2010.

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Plan Provisions De-Sta-Co Employees

Effective date and plan year	Original plan: January 1, 1975 Plan year: calendar year
Status of the plan	Effective December 31, 2023, the plan is frozen to all future accruals and all active participants fully vest in their Accrued Benefit as of such date. Effective December 31, 2023, the plan has been closed to new and rehired participants.
Significant events	None.
Definitions	
• Covered employees	Any non-collectively bargained person employed on an hourly rate basis at the Central Lake Plant or Avery Creek Plant. Avery Creek plant shut down during 2001 and no active employees are covered.
• Participation	Date of becoming a covered employee, Avery Creek Plan employees participate on or after January 1, 1989
• Vesting service	One year for each 1,000-hour calendar year of employment.
• Credited service	One year for each 1,700-hour calendar year of employment, where proportional credit is given in tenths of a year for fewer than 1,700 hours. Credited Service is frozen effective December 31, 2023.
Normal retirement	
• Eligibility	First of month coinciding with or next following the later of attainment of age 65 and fifth anniversary of plan membership.
• Benefit	Monthly benefit for each year of Benefit Service, limited to a maximum of 35 years, multiplied by benefit rate in effect at time of his/her retirement.

Monthly Benefit per Year of Service	Retirement Date
$ 7.50	01/01/1989 – 12/31/1994
$ 8.50	01/01/1995 – 12/31/1995
$ 9.50	01/01/1996 – 12/31/1996
$10.00	01/01/1997 – 12/31/1998
$10.25	On or after 01/01/1999

Early retirement	
• Eligibility	Age 55 with 10 years of Vesting Service.
• Benefit	Monthly pension benefit determined as of early retirement date, reduced 0.5% for each month of payment prior to normal retirement date.
Deferred vested	
• Eligibility	Termination of employment with at least five years of Vesting Service.

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• Benefit	The amount of benefit should be calculated as for Normal Retirement. An employee's deferred vested benefit shall commence in full on his or her normal retirement date, or at the Participant's option, in a reduced benefit prior to normal retirement any time after attaining age 55 with 5 years of Vesting Service, with the reduction as applicable for early retirement.
Disability	
• Eligibility	15 years of Vesting Service.
• Benefit	Accrued benefit payable immediately without any early retirement reduction.
Pre-retirement death	
• Eligibility	Vested under the plan, married one full year prior to death and dies prior to commencement of benefit payments.
• Benefit	The amount of benefit shall equal the amount that would have been made to a spouse under the Joint & 55% Survivor option if: (i) in the case of an eligible Participant who dies after attaining retirement age, the Participant had retired with an immediate 55% Joint & Survivor option on the day before his/her death, or (ii) in the case of an eligible Participant who dies on or before the earliest retirement age, the Participant had (a) separated from service on the date of death, (b) survived to the earliest retirement age, (c) retired with an immediate 55% Joint & Survivor option at the earliest retirement age, and (d) died on the day after the day on which he/she would have attained the earliest retirement age.
Incidental death benefit	
	An incidental death benefit of $2,000 shall be payable upon the death of a retired Participant who was receiving (or who was eligible to receive) monthly retirement benefits under early or normal retirement or was receiving a total and permanent disability benefit to the Participant's designated beneficiary. The amount of such death benefit shall be reduced by the amount of any death benefit payable under any employer-sponsored group insurance program or by the insurance carrier pursuant to a waiver of premium provision in the group insurance contract.
Form of benefits	
• Automatic form for unmarried participants	If Participant either has no spouse as of his/her retirement date or elects to receive his/her income under the normal form, retirement income will be the amount determined as the normal retirement benefit and paid as a single life annuity.
• Automatic form for married participants	Retirement income shall be paid on the basis of Joint and Survivor form, as stipulated by ERISA, and will be the amount determined under the benefit formula multiplied by 95% plus if the age differential is greater than five years, ½% for each year in excess of five the spouse is older and minus ½% for each year in excess of five the spouse is younger.
• Optional forms	Life Annuity, Joint and 75% Survivor Annuity

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• Optional form conversion factors	Amount of an alternative form of benefit (other than a lump sum) which has a value equivalent to the benefit or benefits otherwise payable under the plan, computed on the more generous of the following basis: a) A 6% interest assumption and a mortality assumption according to the RP2000 Mortality Tables for Males and Females with a weighting of 50% males and 50% females projected to 2010. b) The flat rate reductions in effect prior to October 1, 2011 applied to the frozen benefit accrued to September 30, 2011.

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Plan Provisions – Former Elizabethtown, Kentucky Pension Plan

Effective date and plan year	Original plan: June 10, 1977 Plan year: calendar year
Status of the plan	Effective December 31, 2023, the plan is frozen to all future accruals and all active participants fully vest in their Accrued Benefit as of such date. Effective December 31, 2023, the plan has been closed to new and rehired participants.
Significant events	None.
Definitions	
• Covered employees	Employee means any person who is a member of the collective bargaining unit represented by the International Union, United Automobile, Aerospace and Agricultural Implement Workers of America, UAW, and its Local Number 2012, and who is customarily employed by a participating division (the Elizabethtown, Kentucky division of Barnes Group, Inc.) on an hourly-rate basis (including hourly-rate persons on incentive pay plans).
• Participation	Completion of one year of service (1,000 hours in the 12 month period beginning with the date of hire and ending on the first anniversary date of the date of hire and then changing to a plan year basis).
• Vesting service	1,000 hours equals one year of service. For hours less than 1,000, pro-rated credit is given based on actual hours divided by 1,700 hours and rounded down to the nearest 1/10th of a year. If an employee has fewer than 170 hours of Service in any plan year, no service will be credited for such plan year.
• Credited service	1,700 hours equals one year of service. For hours less than 1,700, pro-rated credit is given based on actual hours divided by 1,700 hours and rounded down to the nearest 1/10th of a year. If an employee has fewer than 170 hours of Service in any plan year, no service will be credited for such plan year. Credited Service is frozen effective December 31, 2023.
Normal retirement	
• Eligibility	The first day of the month coinciding with or next following the later of Participant's 65th birthday or 5th anniversary of date of employment.

Schedule SB, Part V — Summary of Plan Provisions

- Benefit

Monthly benefit for each year of Credited Service is calculated based on the following schedule:

Effective Dates	Monthly Benefit Multiplier
Retirement on or after June 10, 1995 and prior to June 10, 1996	$15.00
Retirement on or after June 10, 1996 and prior to June 10, 1997	$15.50
Retirement on or after June 10, 1997 and prior to June 10, 1998	$16.00
Retirement on or after June 10, 1998 and prior to June 10, 1999	$16.50
Retirement on or after June 10, 1999 and prior to May 29, 2000	$17.00
Retirement on or after May 29, 2000 and prior to May 29, 2001	$18.00
Retirement on or after May 29, 2001 and prior to May 29, 2002	$18.75
Retirement on or after May 29, 2002 and prior to May 29, 2003	$19.50
Retirement on or after May 29, 2003 and prior to May 29, 2004	$20.25
Retirement on or after May 29, 2004 and prior to May 29, 2005	$21.00
Retirement on or after May 29, 2005 and prior to May 29, 2006	$22.00
Retirement on or after May 29, 2006 and prior to May 29, 2007	$23.00
Retirement on or after May 29, 2007 and prior to April 1, 2008	$24.00
Retirement on or after April 1, 2008 and prior to April 1, 2009	$24.50
Retirement on or after April 1, 2009 and prior to April 1, 2010	$25.50
Retirement on or after April 1, 2010 and prior to April 1, 2011	$26.50
Retirement on or after April 1, 2011 and prior to April 1, 2012	$27.50
Retirement on or after April 1, 2012 and prior to April 1, 2013	$28.50
Retirement on or after April 1, 2013	$29.50

Early retirement

- Eligibility: Age 55 with 10 years of Vesting Service.
- Benefit: Normal Retirement benefit accrued to early retirement, reduced by 0.6% for each month (7.2% per year) from age 60 to 65 and 0.3% for each month (3.6% per year) from age 55 to 60 by which benefit commencement precedes normal retirement date.

Deferred vested

- Eligibility: Termination of employment with at least 5 years of Vesting Service.
- Benefit: The amount of benefit should be calculated as for Normal Retirement. An employee’s deferred vested benefit shall commence in full on his/her normal retirement date, or at the Participant’s option, reduced by 0.6% for each month (7.2% per year) from age 60 to 65 and 0.3% for each month (3.6% per year) from age 55 to 60 by which benefit commencement precedes normal retirement date, at any time after attaining age 55, provided the employee has 5 or more years of Vesting Service.

Schedule SB, Part V — Summary of Plan Provisions

Disability	
• Eligibility	10 Years of Credited Service if the employee is deemed totally and permanently disabled prior to attaining his/her 65th birthday. The plan administrator shall have the discretion to determine disability under the plan.
• Benefit	Twice the Normal Retirement benefit, if not eligible for Social Security. Once eligible for a Social Security benefit, the disability benefit equals the Normal Retirement benefit.
Pre-retirement death	
• Eligibility	Five years of Vesting Service and married one full year prior to death.
• Benefit	The amount of benefit shall equal the amount that would have been made to a spouse under the Joint & 55% Survivor option: (a) in the case of a Participant who dies after age 55 and 10 years of Service, if the Participant had retired with an immediate surviving spouse option on the day before his/her death, or (b) in the case of a Participant who dies after age 55 with fewer than 10 years of Service, if the Participant had: (i) separated from service on date of death (ii) elected to start receiving immediate pension payments with the Joint & 55% Survivor option in effect, and (iii) died on the day after such immediate pension payments had begun (c) in the case of a Participant who dies prior to age 55 (including Participants who die while receiving a Disability benefit), if the Participant had: (i) separated from service on the date of death (ii) survived to age 55 (iii) elected to start receiving immediate pension payments with the Joint & 55% Survivor option in effect (iv) died on the day after such immediate pension payments had begun, and (d) in the case of a Participant who dies after termination of employment after age 55 (including Participants who die while receiving a Disability benefit), if the Participant had: (i) elected to start receiving immediate pension payments with the Joint & 55% Survivor option in effect (ii) died on the day after such immediate pension payments had begun
• Cost	For each month and part thereof that the pre-retirement survivor annuity coverage is in effect after the Participant terminates employment or after commencement of disability benefits, a reduction will be made to the Participant's retirement income as follows: (i) 1/60 of 1% for each full or partial month of coverage for the months ending prior to the Participant's 45th birthday; and (ii) 1/24 of 1% for each full or partial month of coverage for the months ending after the Participant's 45th birthday

Schedule SB, Part V — Summary of Plan Provisions

• Benefit increases	Benefits payable to Participants who retire or terminate during the period covered by a given collective bargaining agreement will increase as benefit improvements become effective during the period covered by that agreement.
Form of benefits	
• Automatic form for unmarried participants	If Participant either has no spouse as of his/her retirement date or elects to receive his/her income under the normal form, retirement income will be the amount determined as the normal retirement benefit and paid as a single life annuity.
• Automatic form for married participants	Retirement income shall be paid on the basis of Joint and Survivor form, as stipulated by ERISA, and will be the amount determined under the benefit formula multiplied by 95% plus if the age differential is greater than five years, ½% for each year in excess of five the spouse is older and minus ½% for each year in excess of five the spouse is younger.
• Optional forms	The forms of benefits payment available to each Participant shall be the actuarial equivalent of his/her basic Normal Retirement benefit on a straight life annuity basis. The forms of benefit are as follows: 1) Straight Life Annuity 2) Surviving Spouse Option (50%, 75% or 100%) 3) 120 Months Certain and Life Option 4) Level Income Option
• Optional form conversion factors	Amount of an alternative form of benefit (other than a lump sum) which has a value equivalent to the benefit or benefits otherwise payable under the plan are computed as follows: (a) A 6% interest assumption and a mortality assumption according to the RP2000 Mortality Tables for Males and Females with a weighting of 50% males and 50% females projected to 2010 (b) Level Income Option: IRC §417(e) assumptions
Miscellaneous	
• Maximum compensation	Compensation for any 12-month period used to determine accrued benefits may not exceed the limits in IRC §401(a)(17) for the calendar year in which the 12-month period begins. This limit is indexed annually.
• Maximum benefits	Annual benefits may not exceed the limits in IRC §415. This limit is indexed annually. For 2025, the limit is $280,000.

Summary of Major Plan Provisions for Former Members of the Pension Plan for Hourly Employees - Troy Division

Plan name (before merger)	Barnes Group Inc. Pension Plan for Hourly Rate Employees – Barnes Group Inc. − Troy Division
EIN/plan number (before merger)	06-0247840 / 024
Effective date and plan year	Original plan: September 17, 2004 Restated plan: January 1, 2016 Plan year: Calendar
Status of the plan	Effective December 31, 2023, the plan is frozen to all future accruals and all active participants fully vest in their Accrued Benefit as of such date. Effective December 31, 2023, the plan has been closed to new and rehired participants.
Significant events that occurred during the year	None.
Definitions	
• Covered employees	All hourly paid employees who are a member of the collective bargaining unit represented by the UAW Local 174 on or before March 30, 2001.
• Participation	Immediate
• Benefit accrual year of service	A year of service for each year of seniority accrued as a collectively bargained employee, computed to the nearest 1/12th of a year.
• Service	All years of Benefit Accrual Years of Service, provided, however, that an employee shall be credited with a year of Service for each calendar year during which he/she has 185 or fewer aggregate days of layoff or other disqualifying absence, or receives credit for 750 or more hours of service. Credited service is frozen effective December 31, 2023.
Normal retirement	
• Eligibility	The first day of the month coinciding with or next following the later of Participant’s 65th birthday or 5th anniversary of a Participant’s commencement of participation in the plan.

Schedule SB, Part V — Summary of Plan Provisions

• Benefit	Monthly basic retirement benefit for each year of the Participant's Benefit Accrual Years of Service is calculated based on the following schedule:

Effective Dates	Monthly Benefit Multiplier
Retirement on or after April 1, 1989 and prior to April 1, 1990	$12.25
Retirement on or after April 1, 1990 and prior to April 1, 1991	$12.50
Retirement on or after April 1, 1991 and prior to April 1, 1992	$12.75
Retirement on or after April 1, 1992 and prior to April 1, 1993	$13.00
Retirement on or after April 1, 1993 and prior to April 1, 1995	$13.25
Retirement on or after April 1, 1995 and prior to April 1, 1996	$13.75
Retirement on or after April 1, 1996 and prior to April 1, 1997	$14.25
Retirement on or after April 1, 1997 and prior to April 1, 1998	$14.75
Retirement on or after April 1, 1998 and prior to April 1, 1999	$15.25
Retirement on or after April 1, 1999 and prior to April 1, 2000	$15.50
Retirement on or after April 1, 2000 and prior to April 1, 2001	$15.75
Retirement on or after April 1, 2001 and prior to April 1, 2002	$16.00
Retirement on or after April 1, 2002 and prior to April 1, 2003	$16.25
Retirement on or after April 1, 2003 and prior to April 1, 2004	$16.50
Retirement on or after April 1, 2004	$18.00

Early retirement	
• Eligibility	Age 55 with 10 years of Benefit Accrual Years of Service.
• Benefit	Normal Retirement benefit accrued to early retirement, reduced by 0.5% for each month benefit commencement precedes the first day of the month after Participant's 62nd birthday.
Deferred vested	
• Eligibility	Termination of employment with at least 5 years of Service.
• Benefit	The amount of benefit should be calculated as for Normal Retirement. An employee's deferred vested benefit shall commence in full on his/her normal retirement date, or at the Participant's option, reduced by 0.5% for each month by which benefit commencement precedes his/her 62nd birthday, at any time after attaining age 55, provided the employee had completed 10 or more years of Benefit Accrual Years of Service.

Schedule SB, Part V — Summary of Plan Provisions

Disability	
• Eligibility	10 years of Benefit Accrual Years of Service for an employee who is deemed totally and permanently disabled, as determined by the Benefits Committee, prior to attaining his/her 65th birthday.
• Benefit	The disability benefit is equal to the Normal Retirement benefit without any early retirement reduction, plus a supplemental benefit equal to the Normal Retirement benefit offset by Worker's Compensation or other forms of disability payments, payable during the continuance of total and permanent disability until age 65.
Pre-retirement death	
• Eligibility	Five years of Service and is survived by a spouse to whom the Participant has been married continuously during the one year period ending on his/her date of death.
• Benefit	The amount of benefit shall equal the payment that would have been made to a spouse under the 55% joint & survivor option if: (i) in the case of an employee who dies after attaining the earliest retirement age under the plan, the Participant had retired with an immediate 55% joint & survivor option on the day before his/her death, or (ii) in the case of an employee who dies before the earliest retirement age under the plan, the employee had: (i) separated from service on the date of death; (ii) survived to the earliest retirement age; (iii) retired with an immediate 55% joint & survivor option at the earliest retirement age; and (iv) died on the day on which he/she would have attained the earliest retirement age.
• Cost	For each month and part thereof that the pre-retirement survivor annuity coverage is in effect, a reduction will be made to the Participant's retirement benefit as follows: 1/20th of 1% for each complete calendar month commencing on the first day of the month following the Participant's 55th birthday and ending at the earliest of: 2) the Participant's actual retirement date; 3) the Participant's date of death; 4) the Participant's normal retirement date; and the spouse's date of death (if the Participant's spouse dies prior to the Participant date of retirement)
Post-retirement death	
• Eligibility	Any Participant who retired under Normal or Early Retirement, or the Disability provisions of the plan.
• Benefit	Four thousand dollars.
Supplemental Medicare benefit	
• Eligibility	Any retired Participant and/or spouse who are age 65 or older and who is receiving a Normal or Early Retirement benefit.

Schedule SB, Part V — Summary of Plan Provisions

• Benefit	A supplemental monthly medical benefit equal to the Federal Medicare Part-B premium as of April 1, 1989 plus ½ of any increases in the Federal Medicare Part-B premium which occur after April 1, 1989. This monthly supplemental Medicare Benefit is in addition to the amount of the Normal Retirement or Early Retirement benefit.
Benefit increases	Benefits payable to Participants who retire or terminate during the period covered by a given collective bargaining agreement will increase as benefit improvements become effective during the period covered by that agreement.
Form of benefits	
• Automatic form for unmarried participants	If Participant has no spouse as of the retirement date, or elects to receive payment under the normal form, retirement income shall be the amount determined as the normal retirement benefit and paid as a single life annuity.
• Automatic form for married participants	Retirement income shall be paid on the basis of 55% joint & survivor form, as stipulated by ERISA, and will be the amount determined under the benefit formula multiplied by 100% minus ½% for each year in excess of five by which the spouse's age is less than the Participant's age.
• Optional forms	Life Annuity; 55% Contingent Pensioner Option; 75% Contingent Pensioner Option; Lump Sum (small cash-outs only).
• Optional form conversion factors	Amount of an alternative form of benefit (other than a lump sum) which has a value equivalent to the benefit or benefits otherwise payable under the plan, computed on the following basis: a) 55% Contingent Pensioner Option: a 0% reduction plus/minus 1/2% for each year or part of the year where the spouse is more than 5 years younger/older than the participant. b) 75% Contingent Pensioner Option, the more generous of the following: A. A 6% interest assumption and a mortality assumption according to the RP2000 Mortality Tables for Males and Females with a weighting of 50% males and 50% females projected to 2010 B. The flat rate reductions in effect prior to October 1, 2011 applied to the frozen benefit accrued to September 30, 2011.
Miscellaneous	
• Maximum benefits	Annual benefits may not exceed the limits in IRC Section 415. This limit is indexed annually. For 2025, the limit is $280,000.

Schedule SB, Part V — Summary of Plan Provisions

Summary of Major Plan Provisions for Former Members of the Pension Plan for Hourly Rate Employees – Milwaukee Division

Plan Name (before merger)	Barnes Group Inc. Pension Plan for Hourly Rate Employees – Milwaukee Division
EIN / Plan number (before merger)	06-0247840 / 004
Effective date and plan year	Original plan: December 1,1950 Restated plan: January 1, 2016 Plan year: Calendar year
Status of the plan	The plan has ongoing benefit accruals, however, effective July 1, 2017, the plan has been closed to new participants. On April 4, 2024, all active and accruing participants were transferred to the Buyer pursuant to the sale of Associated Spring and the applicable terms in the corresponding Sale and Purchase Agreement.
Significant events that occurred during the year	As of December 31, 2024, the UAW Agreement and Pension Plan and the Pension Plan for Hourly Rate Employees – Milwaukee Division were merged into the Consolidated Pension Plan

Definitions

• Covered employees	Employee means any person described in (a), (b) or (c) below who is a member of the bargaining unit represented by the (Union) United Steelworkers of America (A.F.L- C.I.O.): (a) each person who was covered under the prior plan on June 30, 2000 (b) each person regularly employed by the corporation at its Milwaukee division on an hourly-rate basis (including hourly rate persons on an incentive pay plan), on or after January 1, 1988, and any person employed prior to January 1, 1988 who has an hour of service on or after January 1,1988; and (c) each part-time hourly rate person employed by the corporation at its Milwaukee division who, on a regular and continuous basis, performs jobs having definitely established working hours, the complete performance of which requires fewer hours of work than the regular work week. Leased employees as defined under §414(n) of the Code are excluded from participating under this plan as they are not members of a bargaining unit represented by the Union. Any person employed by the corporation who first completes an hour of service on or after July 1, 2017 is excluded from participating under this Plan.
• Participation	Immediately.
• Vesting service	All years of service with the employer from date of employment to termination, retirement or death.

Schedule SB, Part V — Summary of Plan Provisions

	Hours of Service in Plan Year	Years of Vested Service Earned
	Fewer than 86 hours	0 Years
	86-255 hours	1/10 Year
	256-425 hours	1/5 Year
	426-595 hours	3/10 Year
	596-765 hours	2/5 Year
	766-935 hours	1/2 Year
	939-999 hours	3/5 Year
	1,000 or more hours	1 Year

- Credited service

All years of service with the employer from date of employment to termination, retirement or death. 1,700 hours equals one year with pro-rated credit to the nearest 1/10th of a year.

If an employee has fewer than 170 hours of service in any plan year, no Service will be credited for such plan year.

Normal retirement

- Eligibility

The first day of the month coinciding with or next following the later of Participant's 65th birthday or 5th anniversary of date of employment.

- Benefit

Monthly basic retirement benefit for each year of Credited Service is calculated based on the following schedule:

Effective Dates	Monthly Benefit
Retirement on or after July 1, 1995 and prior to July 1, 1996	$18.50
Retirement on or after July 1, 1996 and prior to July 1, 1997	$19.00
Retirement on or after July 1, 1997 and prior to July 1, 1998	$19.50
Retirement on or after July 1, 1998 and prior to July 1, 1999	$20.00
Retirement on or after July 1, 1999 and prior to July 1, 2000	$20.50
Retirement on or after July 1, 2000 and prior to June 5, 2006	$23.00
Retirement on or after June 5, 2006 and prior to July 12, 2012	$27.00
Retirement on or after July 12, 2012 and prior to July 1, 2013	$28.00
Retirement on or after July 1, 2013 and prior to July 1, 2014	$28.50
Retirement on or after July 1, 2014 and prior to July 1, 2016	$29.00

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	Retirement on or after July 1, 2016 and prior to July 10, 2017	$29.50
	Retirement on or after July 10, 2017 and prior to July 1, 2018	$30.00
	Retirement on or after July 1, 2018 and prior to July 1, 2019	$30.50
	Retirement on or after July 1, 2019 and prior to July 1, 2020	$31.00
	Retirement on or after July 1, 2020 and prior to July 1, 2021	$31.50
	Retirement on or after July 1, 2021 and prior to July 1, 2022	$32.00
	Retirement on or after July 1, 2022 and prior to July 1, 2023	$33.00
	Retirement on or after July 1, 2023 and prior to July 1, 2024	$34.00
	Retirement on or after July 1, 2024	$35.00

Early retirement	
• Eligibility	Age 55 with 10 years of Credited Service.
• Benefit	Unreduced early retirement at age 62. Normal Retirement benefit accrued to early retirement, actuarially reduced by 0.5% for each month prior to 62nd birthday.
• Supplement	Any employee who retires on or after July 1, 1980 and prior to their 62nd birthday will receive a monthly early retirement supplement provided the employee has 30 years or more of Credited Service. This supplement is $500 if the retirement date is on or after July 1, 1995. In addition, this early retirement supplement shall commence on the first day of the month following the date on which the employee retires and shall be payable monthly thereafter until and including the first day of the month in which he/she dies, or he is reemployed by the corporation, or he/she attains age 62, or he/she becomes eligible for Social Security, whichever occurs first.
Deferred vested	
• Eligibility	Termination of employment with at least 5 years of Service.

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• Benefit	The amount of benefit should be calculated as for Normal Retirement. An employee's deferred vested benefit shall commence in full on his or her normal retirement date, or at the Participant's option, reduced by 0.5% for each month by which benefit commencement precedes his/her normal retirement date, at any time after attaining age 55, provided the employee has 10 or more years of Credited Service.
Disability	
• Eligibility	10 years of Credited Service for an employee who is deemed totally and permanently disabled prior to attaining his 65th birthday. The plan Administrator shall have the discretion to determine disability under the plan.
• Benefit	Effective July 1, 1995, the disability benefit is equal to twice the Normal Retirement benefit for each year of Credited Service, if not eligible for Social Security old age or Social Security disability benefit. Once eligible for a Social Security benefit, the disability benefit equals the Normal Retirement benefit.
Special Disability Benefit	
• Eligibility	Any employee who receives disability pension payments under the plan, who has received disability benefits under the Social Security Act for at least 24 consecutive months and who has provided satisfactory evidence that he/she is enrolled and covered for Supplementary Medical Insurance Benefits (Part B Medicare) under the federal Social Security Act.
• Benefit	The amount of the flat monthly benefit is calculated based on the following schedule:

Effective Dates	Monthly Benefit
Retirement on or after July 1, 1995 and prior to July 1, 1998	$17.00
Retirement on or after July 1, 1998 and prior to May 1, 2000	$17.50
Retirement on or after May 1, 2000 and prior to July 1, 2001	$18.00
Retirement on or after July 1, 2001 and prior to July 1, 2002	$18.25
Retirement on or after July 1, 2002 and prior to July 1, 2003	$18.50
Retirement on or after July 1, 2003 and prior to June 5, 2006	$19.00
Retirement on or after June 5, 2006 and prior to July 8, 2012	$54.00
Retirement on or after July 8, 2012 and prior to July 1, 2013	$56.00
Retirement on or after July 1, 2013 and prior to July 1, 2014	$57.00
Retirement on or after July 1, 2014 and prior to July 1, 2016	$58.00

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	Retirement on or after July 1, 2016 and prior to July 10, 2017	$59.00
	Retirement on or after July 10, 2017 and prior to July 1, 2018	$60.00
	Retirement on or after July 1, 2018 and prior to July 1, 2019	$61.00
	Retirement on or after July 1, 2019 and prior to July 1, 2020	$62.00
	Retirement on or after July 1, 2020 and prior to July 1, 2021	$63.00
	Retirement on or after July 1, 2021 and prior to July 10, 2022	$64.00
	Retirement on or after July 10, 2022 and prior to July 1, 2023	$60.00
	Retirement on or after July 1, 2023	$61.00

Pre-Retirement Death

• Eligibility	Five years of Service and married one full year prior to death.
• Benefit	The amount of benefit shall equal the payment that would have been made to a spouse under the Joint & 55% Survivor option if: (a) in the case of an employee who dies after attaining the earliest retirement age under the plan, the employee has retired with an immediate Joint & 55% Survivor option on the day before his/her death, or (b) in the case of an employee who dies on or before the earliest retirement age under the plan, the employee had: (i) separated from service on the date of death; (ii) survived to the earliest retirement age; (iii) retired with an immediate Joint & 55% Survivor option at the earliest retirement age; and (iv) died on the day on which he/she would have attained the earliest retirement age
• Cost	For each month and part thereof that the pre-retirement survivor annuity coverage is in effect, a reduction will be made to the Participant's retirement income as follows: (i) 1/60 of 1% for each full or partial month of coverage for the months ending prior to the Participant's 45th birthday; and (ii) 1/24 of 1% for each full or partial month of coverage for the months ending after the Participant's 45th birthday. For active participants terminating from Barnes Group after January 1, 2019, the plan sponsor will cover the cost of pre-retirement survivor annuity coverage for the period of active employment. These participants will continue to be charged for coverage after they terminate from Barnes Group.

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Special Age 65 Benefit

- Eligibility

Any retiree, or surviving spouse of a retiree, or a surviving spouse of an employee who died before retirement who has provided satisfactory evidence that the participant is enrolled and covered for Supplementary Medical Insurance Benefits (Part B Medicare). This benefit, in addition to his/her basic pension, will be payable on the first day of each month after his/her 65th birthday on which a pension is payable under the plan.

- Benefit

The amount of the flat monthly benefit is calculated based on the following schedule:

Effective Dates	Monthly Benefit
Retirement on or after July 1, 1995 and prior to July 1, 1998	$17.00
Retirement on or after July 1, 1998 and prior to May 1, 2000	$17.50
Retirement on or after May 1, 2000 and prior to July 1, 2001	$18.00
Retirement on or after July 1, 2001 and prior to July 1, 2002	$18.25
Retirement on or after July 1, 2002 and prior to July 1, 2003	$18.50
Retirement on or after July 1, 2003 and prior to June 1, 2012	$19.00
Retirement on or after June 5, 2012	$25.00

Form of benefits

- Automatic form for unmarried participants

If participant either has no spouse as of his/her retirement date or elects to receive his/her income under the normal form, retirement income will be the amount determined under the benefit formula and paid as a single life annuity.

- Automatic form for married participants

If participant has a spouse as of his/her retirement date and does not elect otherwise, retirement income shall be paid on the basis of Joint and 55% Survivor form, as stipulated by ERISA, and will be the amount determined under the benefit formula multiplied by 95% plus ½% for each year in excess of five by which the spouse's age exceeds the employee's age, and minus ½% for each year in excess of five by which the spouse's age is less than the employee's age.

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• Optional forms	Life Annuity; 55% Contingent Pensioner Option; 75% Contingent Pensioner Option; Lump Sum.
• Optional form conversion factors	Amount of an alternative form of benefit (other than a lump sum) which has a value equivalent to the benefit or benefits otherwise payable under the plan, computed as follows. a) 55% Contingent Pensioner Option: a 5% reduction plus/minus ½% for each year or part of the year where the spouse is more than 5 years younger/older than the participant. b) 75% Contingent Pensioner Option, the more generous of the following: 1. A 6% interest assumption and a mortality assumption according to the RP2000 Mortality Tables for Males and Females with a weighting of 50% males and 50% females projected to 2010 2. The flat rate reductions in effect prior to October 1, 2011 applied to the frozen benefit accrued to September 30, 2011.
Miscellaneous	
• Maximum benefits	Annual benefits may not exceed the limits in IRC Section 415. This limit is indexed annually. For 2025, the limit is $280,000.

Schedule SB, Part V — Summary of Plan Provisions

Summary of Major Plan Provisions for Former Members of the UAW Agreement Pension Plan

Plan name (before merger)	UAW Agreement Pension Plan
EIN/Plan number (before merger)	06-0247840 / 001
Effective date and plan year	Original plan: December 1, 1950 Restated plan: September 1, 2021, reflecting amendments through December 31, 2024 Plan year: calendar year
Status of the plan	The plan has ongoing benefit accruals, however, effective January 1, 2018, the plan has been closed to new participants. On April 4, 2024, all active and accruing participants were transferred to the Buyer pursuant to the sale of Associated Spring and the applicable terms in the corresponding Sale and Purchase Agreement.
Significant events that occurred during the year	As of December 31, 2024, the UAW Agreement and Pension Plan and the Pension Plan for Hourly Rate Employees – Milwaukee Division were merged into the Consolidated Pension Plan
Definitions	
• Covered employees	Employee means any person who is a member of the collective bargaining unit represented by the International Union, United Automobile, Aerospace and Agricultural Implement Workers of America, UAW, and who is customarily employed by a participating division (Bristol Spring, Corry, Saline, and on and after October 1, 1986, the former Wallace Barnes Steel division of Barnes Group Inc. shall no longer be a participating division, except for the purposes of the special provisions of vesting rights) on an hourly-rate basis (including hourly-rate persons on incentive pay plans).
• Participation	Immediately. No new participants will enter the plan after December 31, 2017.

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• Vesting service	All years of service with the employer from date of employment to termination, retirement or death.

Hours of Service in Plan Year	Years of Vesting Service Earned
less than 86 hours	0 Years
86-255 hours	1/10 Year
256-425 hours	1/5 Year
426-595 hours	3/10 Year
596-765 hours	2/5 Year
766-935 hours	1/2 Year
936-999 hours	3/5 Year
1,000 or more hours	1 Year

• Credited service	All years of service with the employer from date of employment to termination, retirement or death. For purposes of Credited Service, 1,700 hours equals one year with pro-rated credit to the nearest 1/10th of a year. If an employee has fewer than 170 hours of service in any plan year, no service will be credited for such plan year.
Normal retirement	
• Eligibility	The first day of the month coinciding with or next following the later of Participant's 65th birthday or 5th anniversary of date of employment.

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- Benefit

Monthly benefit for each year of Credited Service is calculated based on the following schedule for participants hired prior to September 1, 2010:

Effective Dates	Monthly Benefit Multiplier
Retirement on or after March 1, 1999 and prior to March 1, 2000	$26.00
Retirement on or after March 1, 2000 and prior to March 1, 2001	$27.25
Retirement on or after March 1, 2001 and prior to March 1, 2002	$28.25
Retirement on or after March 1, 2002 and prior to March 1, 2003	$29.75
Retirement on or after March 1, 2003 and prior to March 1, 2004	$31.25
Retirement on or after March 1, 2004 and prior to March 1, 2005	$32.75
Retirement on or after March 1, 2005 and prior to March 1, 2009	$34.50
Retirement on or after March 1, 2009 and prior to September 1, 2011	$36.00
Retirement on or after September 1, 2011 and prior to September 1, 2013	$37.50
Retirement on or after September 1, 2013 and prior to September 1, 2017	$38.50
Retirement on or after September 1, 2017 and prior to January 1, 2018	$41.00
Retirement on or after January 1, 2018 and prior to July 1, 2018	$42.25
Retirement on or after July 1, 2018 and prior to January 1, 2022	$43.50
Retirement on or after January 1, 2022	$45.50, subject to increases outlined on next page

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Monthly benefit for each year of Credited Service is calculated based on the following schedule for participants hired on or after September 1, 2010:

Effective Dates	Monthly Benefit Multiplier
Retirement on or after September 1, 2010 and prior to September 1, 2013	$18.00
Retirement on or after September 1, 2013 and prior to September 1, 2017	$19.00
Retirement on or after September 1, 2017 and prior to January 1, 2018	$21.50
Retirement on or after January 1, 2018 and prior to July 1, 2018	$23.00
Retirement on or after July 1, 2018 and prior to January 1, 2022	$24.50
Retirement on or after January 1, 2022	$27.50, subject to increases outlined below

For retirement on or after January 1, 2022, the basic monthly benefit is as shown above, subject to the following schedule of increases:

Retirement on or after April 1, 2023 and prior to April 1, 2024	- Increase of $0.50 if GP% for 2022 is equal to or greater than 18% - Increase of $0.75 if GP% for 2022 is equal or greater than 22%
Retirement on or after April 1, 2024 and prior to April 1, 2025	- Increase of $0.50 if GP% for 2023 is equal to or greater than 18% - Increase of $0.75 if GP% for 2023 is equal or greater than 22%
Retirement on or after April 1, 2025	- Increase of $0.50 if GP% for 2024 is equal to or greater than 18% - Increase of $0.75 if GP% for 2024 is equal or greater than 22%

It is our understanding that the GP% for 2023 was greater than 22% so a $0.75 increase applies for participants terminating on or after April 1, 2024.

Participants who terminate between September 1, 2014 and August 31, 2017 are entitled to increased monthly multipliers of $41.00 or $21.50 beginning September 1, 2017.

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Early retirement

- Eligibility: Age 55 with 10 years of Vesting Service.

- Benefit: Normal Retirement benefit accrued to early retirement, reduced based on the schedule below:

Retirement Age	Credited Service	Reduction
Less than age 62	Less than 30 years	0.5% per month prior to age 62
Less than age 58	30 years or more	0.5% per month prior to age 58
Age 58 or over	30 years or more	0.0%
Age 62 or over	Any years	0.0%

- Supplement: Any employee who retires on or after March 1, 1999 with 30 or more years of Credited Service and prior to their 62nd birthday will receive, in addition to the early retirement benefit otherwise payable, a monthly early retirement supplement until age 62. This supplement is calculated as follows:

Effective Dates	Monthly Supplement
Retirement on or after March 1, 1999 and prior to March 1, 2000	$650.00
Retirement on or after March 1, 2000 and prior to March 1, 2001	$675.00
Retirement on or after March 1, 2001 and prior to March 1, 2002	$700.00
Retirement on or after March 1, 2002 and prior to March 1, 2003	$750.00
Retirement on or after March 1, 2003 and prior to September 1, 2014	$800.00
Retirement on or after September 1, 2014 and prior to September 1, 2021	$900.00
Retirement on or after September 1, 2021	$1,000.00

Deferred vested

- Eligibility: Termination of employment with at least 5 years of Vesting Service.

- Benefit: The amount of benefit should be calculated as for Normal Retirement. An employee's deferred vested benefit shall commence in full on his/ her normal retirement date, or at the Participant's option, reduced by 0.6% for each month for the first 5 years and reduced by 0.3% for each month for the second five years by which benefit commencement precedes his/her normal retirement date, at any time after attaining age 55, provided the employee has 10 or more years of Service.

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Plant closing benefit	
Eligibility	The closing of any of the plants of a participating division of Barnes Group Inc. on or after March 1, 1989, and the employee satisfies either of the following conditions: (a) Attained age 50, but not age 55, with at least 15 years of seniority, or (b) Attained age 45, but not age 55, with at least 20 years of seniority
Benefit	(a) Normal Retirement benefit unreduced at age 62, or (b) Normal Retirement benefit at age 55 reduced by 0.5% for each month by which benefit commencement precedes age 62. (c) If the employee has completed at least 30 years of Credited Service at the date of closing, his/her benefit is the Normal Retirement benefit unreduced at age 58 or reduced by 0.5% for each month by which benefit commencement precedes age 58. Additionally, he/she shall receive the early retirement supplement described above.
Plant closing supplement	With respect to plant closing which occurs on or after March 1, 1992: (a) Any employee who is then employed at such division and has completed fewer than 30 years of Credited Service and elects option (b) above will receive, in addition to the plant closing benefit otherwise payable, a monthly special plant closing supplement. (b) Employees who have completed at least 10 years of Credited Service, but less than 30 years of Credited Service and attained age 55 and elects option (b) above will receive, in addition to the plant closing benefit otherwise payable, a monthly special plant closing supplement. The amount of the special plant closing supplement shall be $18.33 per month per year of Credited Service. This benefit is payable until the earliest of death, attainment of age 62 and eligibility for Social Security.
Disability (including additional disability benefit)	
• Eligibility	10 years of Credited Service for an employee who is deemed totally and permanently disabled prior to attaining his/her 65th birthday. The plan administrator shall have the discretion to determine disability under the plan.

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• Benefit	Normal Retirement benefit plus an additional disability benefit, if not eligible for Social Security. This additional disability benefit for each year of Credited Service is calculated based on the following schedule: **Effective Dates** / **Monthly Benefit** Retirement on or after March 1, 2002 and prior to March 1, 2002 — $24.00 Retirement on or after March 1, 2002 and prior to March 1, 2003 — $25.50 Retirement on or after March 1, 2003 and prior to March 1, 2004 — $27.00 Retirement on or after March 1, 2004 and prior to September 1, 2011 — $28.50 Retirement on or after September 1, 2011 — $37.50 Once eligible for a Social Security benefit, the disability benefit equals the Normal Retirement benefit.
Special disability benefit	
Eligibility	Any employee who receives disability pension payments under the plan, who has received disability benefits under the Social Security Act for at least 24 consecutive months and who has provided satisfactory evidence that he/she is enrolled and covered for Supplementary Medical Insurance Benefits (Part B Medicare) under the federal Social Security Act.
Benefit	The amount of the flat monthly benefit is calculated based on the following schedule: **Effective Dates** / **Monthly Benefit** Retirement on or after March 1, 1999 and prior to March 1, 2000 — $26.00 Retirement on or after March 1, 2000 and prior to March 1, 2001 — $27.00 Retirement on or after March 1, 2001 and prior to March 1, 2002 — $28.00 Retirement on or after March 1, 2002 and prior to March 1, 2003 — $30.00 Retirement on or after March 1, 2003 and prior to March 1, 2004 — $31.00 Retirement on or after March 1, 2004 — $32.00

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	Effective March 1, 2006, the flat monthly benefit for non-grand parented retirees in certain divisions who retired prior to March 1, 2006 and not covered under the company-provided Medicare (Part D) prescription drug program is increased as follows if the participant is covered under and required to pay premiums pursuant to the Health Care Agreement:

Division	Increase to the benefit as of March 1, 2006
Corry Division (package code 170)	$10
Corry Division (package code 190)	$40
Bristol Division (package code 150 and 160)	$20
Dayton Division (package code 251)	$25
Dayton Division (package code 252)	$10
All Others	$50

Pre-retirement death	
• Eligibility	Five years of Vesting Service and married one full year prior to death.

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• Benefit	The amount of benefit shall equal the payments that would have been made to a spouse under the Joint & 55% Survivor option: 1) in the case of a Participant who dies after age 55 with at least 10 years of Service, if the Participant had retired with an immediate Joint & 55% Survivor option on the day before his/her death, or 2) in the case of a Participant who dies after age 55 with fewer than 10 years of Service, if the Participant had: • separated from service on date of death • elected to start receiving immediate pension payments with the Joint & 55% Survivor option in effect, and 3) died on the day after such immediate pension payments had begun in the case of a Participant who dies prior to age 55, if the Participant had: (i) survived to age 55 (ii) separated from service on the date of death (iii) elected to start receiving immediate pension payments with the Joint & 55% Survivor option in effect, and (iv) died on the day after such immediate pension payments had begun 4) in the case of a Participant who dies after termination of employment after age 55, if the Participant had: • elected to start receiving immediate pension payments with the Joint & 55% Survivor option in effect, and • died on the day after such immediate pension payments had begun 5) died on the day after such immediate pension payments had begun in the case of a Participant who dies prior to age 55 while receiving a Disability benefit, if the Participant had: (a) separated from service on the date of death (b) elected to start receiving immediate pension payments (subject to a 54% reduction for early retirement) (c) died on the day after such immediate pension payments had begun. 6) in the case of a Participant who dies after age 55 but prior to age 62 with fewer than 30 years of Credited Service and while receiving a Disability benefit, if the Participant had retired with an immediate Joint & 55% Survivor option on the day before his/her death as adjusted for early retirement. If such a Participant dies after his/her 62nd birthday, no reduction for early retirement will apply. 7) in the case of a Participant who dies after age 55 but prior to age 58 with 30 years or more of Credited Service and while receiving a Disability benefit, if the Participant had retired with an immediate Joint & 55% Survivor option on the day before his/her death as adjusted for early retirement. If such a Participant dies after his/her 58th birthday, no reduction for early retirement will apply.
• Cost	With respect to Participants who are employees on or after March 1, 1992, the cost of the Pre-retirement Spouse benefit shall be borne by the plan. With respect to Participants whose employment terminated prior to March 1, 1992, the provisions of the prior plan shall govern concerning the costs of this coverage.

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Surviving spouse income

- Eligibility

Upon the death of a Participant who has 10 or more years of Vesting Service, the surviving qualified spouse of the Participant will become eligible for a surviving spouse income benefit, provided that the Participant's death occurs before his/her seniority is broken. For purposes of this paragraph, a disabled pensioner's seniority is not deemed to be broken.

- Benefit

The amount of the flat monthly benefit is calculated based on the following schedule:

Effective Dates	Monthly Benefit if Not Eligible for Social Security	Monthly Benefit if Eligible for Social Security
Retirement on or after March 1, 2001 and prior to March 1, 2002	$600	$400
Retirement on or after March 1, 2002 and prior to March 1, 2003	$650	$450
Retirement on or after March 1, 2003 and prior to March 1, 2004	$675	$475
Retirement on or after March 1, 2004	$700	$500

The surviving spouse income benefit will be payable monthly to the spouse beginning on the first day of the month following the Participant's death and will continue until the earlier of the death of such spouse or the 24th monthly payment.

Special age 65 benefit

- Eligibility

Any retiree, or surviving spouse of a retiree, or a surviving spouse of an employee who died before retirement who has provided satisfactory evidence that the Participant is enrolled and covered for Supplementary Medical Insurance Benefits (Part B Medicare). This benefit, in addition to his/her basic Normal Retirement benefit, will be payable on the first day of each month after his/her 65th birthday on which a pension is payable under the plan.

- Benefit

The amount of the flat monthly benefit is calculated based on the following schedule:

Effective Dates	Monthly Benefit
Retirement on or after March 1, 2002 and prior to March 1, 2003	$30.00
Retirement on or after March 1, 2003 and prior to March 1, 2004	$31.00
Retirement on or after March 1, 2004	$32.00

Effective March 1, 2006, the flat monthly benefit for non-grand- parented retirees in certain divisions who retired prior to March 1, 2006 and are not covered under the company-provided Medicare (Part D) prescription drug program is increased as follows if the participant is covered under and required to pay premiums pursuant to the Health Care Agreement:

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	Division	Increase to the benefit as of March 1, 2006
	Corry Division (package code 170)	$10
	Corry Division (package code 190)	$40
	Bristol Division (package code 150 and 160)	$20
	Dayton Division (package code 251)	$25
	Dayton Division (package code 252)	$10
	All Others	$50

Form of Benefits	
• Automatic form for unmarried participants	If participant either has no spouse as of his/her retirement date or elects to receive his/her income under the normal form of annuity, retirement income will be the amount determined under the benefit formula and paid as a single life annuity.
• Automatic form for married participants	If participant either has no spouse as of his/her retirement date and does not elect otherwise, retirement income shall be paid on the basis of Joint and 55% Survivor form, as stipulated by ERISA, and will be the amount determined under the benefit formula multiplied by a factor generated using a 6% mortality assumption according to the RP2000 Mortality Tables for Males and Females with a weighting of 50% males and 50% females projected to 2010, so long as the resulting amount is not less than the frozen benefit calculated at October 1, 2011 with the factors in effect at that date.
• Optional forms	The forms of benefit payment available to each Participant shall be the actuarial equivalent of his/her basic Normal Retirement benefit on a straight life annuity basis. The forms of benefit are as follows: a. Straight Life Annuity b. Surviving Spouse Option (55%, 75% or 100%) i. Level Income Option

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• Optional form conversion factors	Amount of an alternative form of benefit (other than a lump sum) which has a value equivalent to the benefit or benefits otherwise payable under the plan, computed as follows: • For 55% contingent pensioner option: a 5% reduction plus/minus 1/2% for each year or part of the year where the spouse is more than 5 years younger/older than the participant. • For other contingent pensioner options, the more generous of the following: a) A 6% interest assumption and a mortality assumption according to the RP2000 Mortality Tables for Males and Females with a weighting of 50% males and 50% females projected to 2010 b) The flat rate reductions in effect prior to October 1, 2011 applied to the frozen benefit accrued to September 30, 2011. 2) Level Income Option: IRC §417(e) assumptions.
Miscellaneous	
• Maximum benefits	Annual benefits may not exceed the limits in IRC Section 415. This limit is indexed annually. For 2025, the limit is $280,000.

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Benefits included or excluded

Unless noted below, all benefits provided by the plan are included in this valuation:

- **Plan amendments excluded:** None.
- **Late retirement increases:**
  - *Active participants:* The plan provides benefit suspension notices to participants who work beyond normal retirement; therefore, late retirement actuarial increases only apply to participants who defer retirement beyond age 70½. This valuation includes increases for current participants over age 70.
  - *Deferred vested participants:* Current deferred vested participants over normal retirement age are valued including the late retirement actuarial increase.
- **Internal Revenue Code limitations:** The limitations of Internal Revenue Code Section 415(b) and 401(a)(17) have been incorporated into our calculations.
- **IRC Section 416 rules for top-heavy plans:** We did not test whether this plan is top-heavy (when the present value of benefits for key employees equals or exceeds 60% of the present value for all participants). However, we expect that the plan is not top-heavy due to the large number of rank-and-file participants; therefore, the funding target and target normal cost do not reflect any liability for top-heavy benefit accruals.
- **Shutdown benefits for UAW Pension Plan:** We are not aware of any corporate actions that would create future shutdown benefits; therefore, they are excluded. Previous shutdown benefits payable under the plan are included in this valuation.
- **Benefit restrictions:** Benefit restrictions (if applicable) are ignored in this valuation.

Additional benefits included or excluded

- **IRC Section 436 benefit restrictions:**
  - *Unpredictable contingent event benefits:* This valuation excludes restricted contingent event benefits for events that occurred before the valuation date but includes contingent event benefits for events that are expected to occur on or after the valuation date regardless of anticipated funding-based limitations.
  - *Plan amendments:* See above.
  - *Prohibited payments:* Limitations on prohibited benefits (if any) are reflected for annuity starting dates before the valuation date but are ignored for annuity starting dates on or after the valuation date.
  - *Benefit accruals:* The plan's funding target does not reflect any limitation on benefit accruals. The target normal cost does not reflect any limitation on benefit accruals.
- **Scheduled benefit increases:** Scheduled benefit increases effective after the end of the current plan year are excluded from minimum funding requirements.

- **Unpredictable contingent event benefits:** The plan does not have any unpredictable contingent event benefits.

Plan provision changes since prior valuation

As of December 31, 2024, the UAW Agreement and Pension Plan and the Pension Plan for Hourly Rate Employees – Milwaukee Division were merged into the Consolidated Pension Plan

Maximum compensation and benefit amounts under IRS rules were updated from to 2024 to 2025.

Schedule SB, line 32 — Schedule of Amortization Bases

The total shortfall amortization charge is the sum of the individual shortfall amortization installments for each plan year since the IRC Section 430 changes made by ARPA took effect for the plan. Although an individual shortfall amortization installment can be negative, the combined shortfall amortization charge cannot be less than $0.

Shortfall bases					
Year established		**Outstanding balance**	**Years remaining**		**2025 Installment**
2023	$	26,769	13	$	2,745
2024		(16,321)	14		(1,590)
Total	$	10,448		$	1,155

Schedule SB, line 24 — Change in Actuarial Assumptions

- The expense component of normal cost increased from $815,000 to $1,085,000 to reflect our expectations for the current year.