

# OSCPA GROUP HEALTH PLAN



Trustees of the Oregon Society of Certified Public Accountants Group Health Trust  
P.O. Box 4555  
Beaverton, Oregon 97076-4555  
Telephone: 503-641-7200

## SUMMARY MATERIAL MODIFICATIONS TO 2023 SUMMARY PLAN DESCRIPTON - revised

July 27, 2025

Dear Participant or Beneficiary:

Since issuance of the July 1, 2023, Summary Plan Description (“SPD”) for the OSCP Group Health Plan and the July 1, 2024, Summary of Material Modifications (SMM), which is a summary that supplements the group contract and the summaries of benefits provided by the insurer, certain factual information in the SPD has changed. Those changes are reflected below, with reference to the affected SPD page number. Please keep this summary of material modifications with your SPD and the group contract and summaries of benefits provided by the insurer. More information is available at <https://www.orcpa.org/group-health-programs>. You may obtain a hard copy by contacting the Plan Administrator.

### **Section 1. PLAN INFORMATION—Trustees (SPD page 4).**

Effective January 1, 2025, the Trustees are as follows:

Geoffrey T. Dougall, Chair  
Dougall Conradie LLC  
9400 S.W. Barnes Road, Suite 309  
Portland, Oregon 97225-6658

Patrick Priest, Secretary  
CIS  
P.O. Box 1469  
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Stone Associates CPAs LLC  
1 Centerpointe Drive, Suite 103  
Lake Oswego, OR 97035-8638

Effective January 22, 2025, new officers were elected by the Board of Trustees of the OSCPA Group Health Trust. Details are provided in this document.

If you have any questions regarding these changes, contact the Plan Administrator at:

Oregon Society of Certified Public Accountants Group Health Trust  
10206 SW Laurel Street  
Beaverton, OR 97005  
503-641-7200 / 800-255-1470

Sincerely,

Trustees of OSCPA Group Health Trust