

Information submitted via Top Hat Plan Statement Online Filing System to U. S.
Department of Labor under 29 CFR 2520.104-23

Date Completed: 3/20/2026 11:47 AM EST

Confirmation Number: 16238

Amended Confirmation Number:

Employer Information

Name: Heritage Funeral Homes, Inc.
Address: 7625 S. Howell Avenue
City: Oak Creek
State: WI
Zip Code: 53154

Plan Administrator Information

Name: Heritage Funeral Homes, Inc.
Address: 7625 S. Howell Avenue
City: Oak Creek
State: WI
Zip Code: 53154
Phone: 4143217440
Email: paul.johnson@heritagefuneral.com

Plan Information

Employer maintains the plan or plans below primarily for the purpose of providing deferred compensation for a select group of management or highly compensated employees.

ID:1 Plan Name: The Heritage Funeral Homes Retirement Plan Number of
for John T. Klemmer, Timothy L. Johnson, and Employees: 3
Mark E. Reiss

Additional Information:



U. S. Department of Labor
Employee Benefits Security Administration
Washington, DC 20210

This message confirms that the Department of Labor's (DOL's) Employee Benefits Security Administration (EBSA) has received the filing of your Top Hat Plan Statement. The confirmation code for your filing is 16238. When correcting errors to your filing, please use this code in your amended statement. This communication does not mean that DOL has made a determination that you are eligible to file under DOL regulation 29 CFR 2520.104-23.