



Getting started with your equity awards

Applied Industrial Technologies Long-Term Incentive Plan



Award access and resources



Benefits OnLine®

benefits.ml.com

Once you have access to Benefits OnLine, you can view the value of your awards, take any necessary actions, receive important alerts, and more.



Download the free Benefits OnLine app

Scan the code above to use the app to stay on top of your equity awards and perform transactions (including selling shares of company stock).* Be sure to turn on notifications to receive important notices about your awards.



**Participant service representatives
and voice response system**

877.767.2404 or 609.818.8894
855.224.2541 or 609.450.1857 (SSN8)

To access the phone system (virtually 24/7), you can use your Social Security number or internal verification number/employee identification number.

🌐 To call Merrill without a charge from outside the U.S., Puerto Rico and Canada, view these [instructions](#).

<ABC Financial Advisor Group>
(Your Merrill financial advisor team)

XXX.XXX.XXXX

Call **8 a.m. to 6 p.m.** Eastern, any day the **New York Stock Exchange / Nasdaq** is open.

From outside the U.S., Puerto Rico or Canada, dial direct (for a charge) **xxx.xxx.xxxx**.

Secure Message Center [if the plan doesn't have SMC, remove this section]

Conveniently exchange equity award-related messages and documents with Merrill using the **Secure Message Center** on the Benefits OnLine website. Visit go.ml.com/smc_inst to learn more.

*The app is designed to work with most mobile devices in most countries. Carrier fees may apply.

This brochure is a general description of equity plan services. Any awards that you have or may be granted are subject to the terms of your company's plan, any agreement between you and your company covering your equity awards, and the prospectus provided to you by your company. Any transactions in connection with your plan in your Merrill brokerage account are subject to the terms and conditions of that account. This brochure does not constitute an offer or invitation to buy any securities. Any offer to buy securities from your company would be made only by a prospectus in accordance with the Securities Act of 1933 as amended, and all applicable laws.

Merrill Lynch, Pierce, Fenner & Smith Incorporated (also referred to as "MLPF&S" or "Merrill") makes available certain investment products sponsored, managed, distributed or provided by companies that are affiliates of Bank of America Corporation ("BofA Corp."). MLPF&S is a registered broker-dealer, registered investment adviser, member SIPC, and a wholly owned subsidiary of BofA Corp.

Investment products:

Are Not FDIC Insured	Are Not Bank Guaranteed	May Lose Value
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Equity awards can be an important part of your overall compensation, and can help you finance many of your life's priorities — from family and leisure to health care and college.



Merrill offers a wide range of resources to help you manage and monitor your awards, including ongoing enhancements to the Benefits OnLine website and app. On Benefits OnLine, you can:

- See the current and potential value of your awards
- Sell company stock and model your awards
- View your statements, confirmations and forms
- Use the resources in the Education Center to help you understand your awards and how they work

Please keep this guide with your award agreements and related plan documents as a reference.

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Section 16/Rule 144

If you are a director, executive officer, associate or other person subject to Rule 144 or Section 16 of the Securities Exchange Act of 1934, as amended ("Section 16 persons"), you will work directly with your financial advisor team to open your brokerage account and conduct transactions. You will still enjoy the convenience of online access to your award and account information as well as other helpful resources.

Your equity awards checklist

There are a few things you need to do on Benefits OnLine to get started with your equity awards. Use this checklist to guide you through the steps, and what you'll need to have on hand to complete each one.

To view portions of the Benefits OnLine website in another language, select your **Language Preference** from the drop-down list at the top of the page. Whenever you log in from the same computer, Benefits OnLine will remember your choice.

STEP 1

Create your User ID and password

Visit Benefits OnLine
benefits.ml.com

If you already have a User ID and password for another plan at Merrill, you don't need to create new ones. If you're outside of the U.S. and need help accessing Benefits OnLine, visit go.ml.com/eqint.

What you'll need:

- Your Social Security number and PIN mailed to you from Merrill (if you're a U.S. citizen or resident)
- Your 9-digit internal verification number (if you're an international employee) and your PIN mailed to you from Merrill

If you don't have a PIN, select "Forgot Your PIN" and follow the instructions.

STEP 2

Open your Merrill brokerage account and complete your tax certification

- Log in to Benefits OnLine
- Follow the prompts to open your Limited Individual Investor Account (LIIA). See detailed instructions at go.ml.com/eqba.
- Follow the prompts to complete your tax certification or you will be subject to backup withholding on your award transactions

The LIIA is a limited, self-directed, non-interest-bearing brokerage account and **must** be opened before you can conduct transactions related to your equity awards — even if you have another Merrill brokerage account.

To open your LIIA, you'll need:

- Your Benefits OnLine User ID and password

To complete your tax certification, you'll need:

- Your Social Security number (if you're a U.S. citizen or resident)
- Your tax identification number (if you're a non-U.S. citizen or a non-resident)

STEP 3

Accept your awards

You may be prompted to accept certain awards before you can exercise them or receive shares or cash payouts. Accepting your awards right away can help you avoid potential delays later. For instructions, visit go.ml.com/eqacaw.

STEP 4

Set up direct deposit or wire instructions

Cash proceeds from your award transactions can be deposited directly to a U.S.-based checking or savings account — or you can set up wire instructions to transfer funds from your Merrill brokerage account to another account

What you'll need to set up direct deposit:

- Your bank account number and your bank's ABA routing code

What you'll need to set up wire instructions:

- Your bank's ABA routing code (or SWIFT code for non-U.S. financial institutions) and the account number where you want the funds to go

STEP 5

Set up online delivery

On Benefits OnLine, you can set up convenient online delivery for your statements, confirmations and other awards-related communications. You can also sign up to receive personalized financial education to help you enhance your financial well-being. Go to **Email Preferences** under the **Profile & Settings** menu.



A guide to your account

Get instructions for taking these steps and other actions on Benefits OnLine.

Visit go.ml.com/eqaa.

Alternate text for Step 1

If client has SSN8, replace variable text with this.

What you'll need:

- Your Social Security number (if you're a U.S. citizen or resident)
- Your employee identification number (if you're an international employee)

Nonqualified Stock Options

What they are

The right to purchase company stock at a set price for a specific period.

How they work

- Subject to a waiting period (also called a vesting period), an exercise (purchase) period and an expiration date.
- Stock can be purchased during the exercise period at the price specified when the Nonqualified Stock Options were granted (grant price). The Stock Options typically have a grant price that is not less than the stock's fair market value (FMV) on the date of grant. This purchase is called "exercising your Stock Options."
- If you do not exercise your Stock Options before the expiration date, you forfeit your Stock Options.¹

Please read the grant agreement provided by your company for details on the specific terms and conditions of your award. For more information, contact your [human resources or benefits](#) or [legal](#) department.

Taxes

- When you exercise Nonqualified Stock Options, the difference between the grant price and the FMV² of the stock at the time of exercise is considered ordinary income under federal U.S. tax law. State and local taxes may also apply. In non-U.S. locations, tax implications may vary.³
- Taxes on this ordinary income are generally due at the time of exercise in addition to payroll taxes (see "Choosing an exercise method" on the next page).
- If and when you sell your stock at a later date, the difference between the FMV of the stock at the time of exercise and the sale date is treated as a capital gain or loss. State and local taxes may also apply. In non-U.S. locations, tax implications may vary.³

Lifecycle of Nonqualified Stock Options

Award date

Stock Options are granted at a set price; vesting period begins

Vesting period

Waiting period before Stock Options can be exercised and the underlying shares purchased

Vesting date

Date Stock Options become exercisable

Exercise period

Stock Options can be exercised to purchase stock at the grant price

Expiration date

Date the right to exercise Stock Options expires
Unexercised Stock Options are forfeited



A guide to Stock Options

Get instructions for modeling and exercising your Stock Options on Benefits OnLine. Visit go.ml.com/eqso.

¹ If your expiration date falls on a weekend or a holiday of the [New York Stock Exchange/Nasdaq](#), you usually must exercise by the market close on the trading day before your expiration date. Earlier expiration dates may apply under your company plan due to termination of employment, disability or death. Please refer to the terms and conditions of your plan for rules relating to earlier expiration of Stock Options.

² The definition of the stock's FMV is generally the market price for publicly traded stock and the value determined by an appraisal or other valuation for non-publicly traded stock.

³ Merrill, its affiliates, and financial advisors do not provide legal, tax, or accounting advice. You should consult your legal and/or tax advisors before making any financial decisions.

Nonqualified Stock Options (continued)

Choosing an exercise method

When you decide to exercise your Nonqualified Stock Options, you must choose an exercise method. The method you choose will depend on how you want to pay for the purchase of your shares and whether you want to receive the proceeds in stock or in cash. The method you choose will also depend on the terms of your company's plan document and your grant agreement. Here is an example of exercise costs and the exercise methods that may be available to you.

Example of exercise costs⁴

Options granted	Grant price/ Exercise cost	Fair market value on exercise date	Gain (taxable income)	Assumed tax rate ⁵	Taxes due at exercise	Total exercise cost (includes taxes; excludes fees and commissions)
1,000	\$10 per share (Total: \$10,000)	\$15 per share (Total: \$15,000)	\$5,000	33%	\$1,650 (\$5,000x.33)	\$11,650 (\$10,000 to purchase shares + \$1,650 in taxes)

Exercise methods

If you want to receive...	And you prefer to pay all exercise costs using...	Consider this method	Example (includes taxes; excludes fees and commissions)
Cash	Cash from the sale of shares from your award	Cashless sell All shares are sold, and you receive the net cash proceeds after exercise costs are deducted.	Exercise cost: \$11,650 Cash paid: \$0 Shares sold: 1,000 You receive: \$3,350 cash (\$15,000 cash proceeds – \$11,650 costs)
Shares	Cash from the sale of shares from your award	Cashless hold Some of your shares are sold to cover the exercise costs, and you receive the net shares.	Exercise cost: \$11,650 Cash paid: \$0 Shares sold: 777 (\$11,650/\$15 to cover costs) You receive: 223 net shares and \$5 cash
Shares	Cash that you provide to Merrill There is no fee for a cash purchase exercise.	Cash purchase You receive all shares from your exercise request.	Exercise cost: \$11,650 Cash paid: \$11,650 Shares sold: 0 You receive: 1,000 shares
Shares	Shares that you already own You "attest" that you own the shares. These attested shares are "swapped" for new shares (you keep the certificates or other ownership documents for the attested shares).	Stock swap The total number of shares is reduced by the number of shares needed to cover the exercise costs, and you receive the net new shares. (A stock swap exercise must be conducted through a participant service representative.)	Exercise cost: \$11,650 Cash paid: \$0 Shares swapped: 777 (\$11,650/\$15 to cover costs) You receive: 223 net new shares

⁴ Examples are for illustrative purposes only.

⁵ Actual tax withholding may vary based on annual earnings and state and local tax rates. In addition, actual taxes owed when filing your tax returns may vary based on your adjusted gross income and other factors.

Restricted Awards

What they are

Restricted Stock

- Actual shares of your company stock recorded in your name in company stockholder records. These shares are subject to restrictions on the transferability and are forfeitable upon certain events.
- Generally, even during the restricted period, these shares carry voting rights and dividends when or if declared by your company for payment to stockholders.

Restricted Stock Units

- An unsecured promise from your company to deliver company stock at a future date.
- Restricted Stock Units are not actual shares of company stock, and therefore they do not carry voting rights or provide dividends; however, they may provide for dividend equivalents.

How they work

- Generally subject to employment and vesting criteria. **The vesting period is often referred to as the restriction period.** **Restricted Stock/Restricted Stock Units** may not be sold, pledged, transferred or assigned during this period.
- You generally do not purchase the shares underlying these awards. You will receive the vested, transferable shares (or cash, if applicable) when the vesting conditions are met and the “restriction” period ends. If the vesting conditions are not met, the award may be forfeited. Tax withholding generally

applies at the time the award vests. Your vested, transferable shares will be delivered to your Merrill brokerage account.

Please read the grant agreement provided by your company for details on the specific terms and conditions of your award. For more information, contact your **human resources or benefits or legal** department.

Taxes

- Generally, awards are taxed as ordinary income under federal U.S. tax law based on their total fair market value on the restriction lapse (vesting) date.
- Withholding taxes are generally due on that date. State and local taxes may also apply. In non-U.S. locations, tax implications may vary.⁶
- **Your withholding taxes will be paid as specified by your plan (or, if applicable, as chosen by you) through:**
 - **Share withholding** — Some of your awarded shares are withheld for taxes and you receive the net shares (no sale of shares takes place).
 - **Sell to cover** — Some of your awarded shares are sold to cover withholding taxes and you receive the net shares.
 - **Cash payment** — You pay withholding taxes in cash and keep all of your awarded stock. Funds to cover taxes must be in your account, sent by check or wired to Merrill before the restriction lapse (vesting) date.

Lifecycle of Restricted Awards

Award date

Awards are granted; restriction (vesting) period begins

Restriction (vesting) period

Waiting period before you receive vested, transferable stock

Tax requirement

Tax withholding obligation to be met as specified by your plan (or, if applicable, as chosen by you)

Restriction lapse (vesting) date

Restriction period ends and vested, transferable shares become available for delivery
Tax withholding obligation met

Share deposit

Shares (or cash, if applicable) are generally deposited to your brokerage account within 72 hours, though this may vary

Alternate text for tax payment:

Add the following copy to the default tax option

This is the default tax payment method if no election is made.



A guide to Restricted Awards

Get instructions for modeling your Restricted Awards on Benefits OnLine. Visit go.ml.com/eqr-su.

⁶ Merrill, its affiliates, and financial advisors do not provide legal, tax, or accounting advice. You should consult your legal and/or tax advisors before making any financial decisions.

Performance Awards

What they are

Performance Shares

- Actual shares of company stock recorded in your name in company shareholder records. These shares are subject to restrictions on transferability and are forfeitable upon certain events.
- Generally, even during the restricted period, these shares carry voting rights and provide dividends when or if paid by your company.

Performance Units

- An unsecured promise from your company to deliver company stock or cash at a future date.
- Performance Units are not actual shares of company stock and do not carry voting rights or provide dividends; however, they may provide for dividend equivalents.

How they work

- Must be earned based on the attainment of company performance goals over a given performance period. **Performance Shares/Performance Units** may not be sold, pledged, transferred or assigned during the performance period.
- You generally do not purchase the shares underlying these awards. You will receive the vested, transferable shares (or cash, if applicable) when the performance/vesting conditions are met and the vesting period ends. If the performance/vesting conditions are not met, the award may be forfeited.

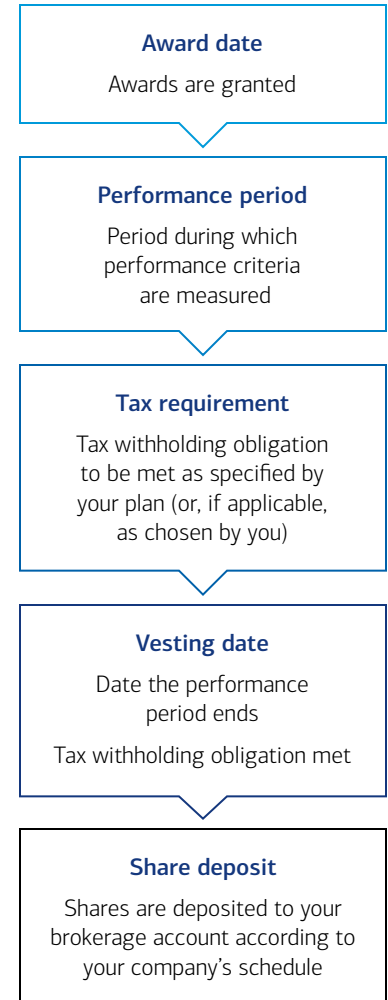
Tax withholding generally applies at the time the award vests. Your vested, transferable shares will be delivered to your Merrill brokerage account.

Please read the grant agreement provided by your company for details on the specific terms and conditions of your award. For more information, contact your **human resources or benefits or legal** department.

Taxes

- Generally, awards are taxed as ordinary income under federal U.S. tax law based on their total fair market value on the vesting date.
- Withholding taxes are generally due on that date. State and local taxes may also apply. In non-U.S. locations, tax implications may vary.⁷
- **Your withholding taxes will be paid as specified by your plan (or, if applicable, as chosen by you) through:**
 - **Share withholding** — Some of your awarded shares are withheld for taxes and you receive the net shares (no sale of shares takes place).
 - **Sell to cover** — Some of your awarded shares are sold to cover withholding taxes and you receive the net shares.
 - **Cash payment** — You pay withholding taxes in cash and keep all of your awarded stock. Funds to cover taxes must be in your account, sent by check or wired to Merrill before the vesting date.

Lifecycle of Performance Awards



A guide to Performance Awards

Get instructions for modeling your Performance Awards on Benefits OnLine. Visit go.ml.com/eqpa.

Alternate text for Tax payment:

Add the following copy to the default tax option

This is the default tax payment method if no election is made.

⁷ Merrill, its affiliates, and financial advisors do not provide legal, tax, or accounting advice. You should consult your legal and/or tax advisors before making any financial decisions.

Deposit funds into your brokerage account

For a [cash purchase exercise](#) or [cash payment tax election](#), you may need to deposit funds into your brokerage account to cover the costs of those transactions if you do not have sufficient funds in your account. Deposits can be made as outlined below.

Important: To initiate a cash purchase exercise order, please speak with a participant service representative [or place the order online](#). NOTE: Delete this line if there are no stock options offered in the plan.

To deposit funds via check

Make check payable to: Merrill

Mail to:

Merrill

1400 American Boulevard

NJ2-140-03-17

Pennington, NJ 08534

Please include your 8-digit brokerage account number on the check.

To deposit funds via wire transfer

Provide the financial institution from which you are transferring funds the following information:

Bank name: Bank of America

ABA#: 026009593

Bank address: 100 West 33rd St.

New York, NY 10001

For international wires add:

SWIFT BOFAUS3N

Merrill account #: 6550113516

Please include your 8-digit brokerage account number, name and address.



Transfer company stock to your brokerage account

If you have company stock from an equity plan at another financial institution, you can transfer it to your Merrill brokerage account. This offers you the opportunity to keep your company stock in one account for ease of access.

If you choose to transfer jointly owned shares of company stock to your Merrill brokerage account (LIIA), you will be changing ownership upon transfer. Please check with your current financial institution regarding the ownership change process. There is no service fee charged to you by Merrill for this broker-to-broker transfer.

To make a transfer, follow these steps:

- Contact the financial institution that holds your company shares.
- Confirm that Depository Trust Company (DTC) transfers are permitted and what the fees may be. If you can't make a DTC transfer, contact a participant service representative for more information.

You may be required to complete a form for this request.

What you need

1. Your Merrill brokerage account number (LIIA)
2. Your exact name and title as listed on the account
3. Merrill's DTC number (8862)
4. The number of shares you want to transfer



Any transferred shares should be electronically delivered to your Merrill account within three to five business days (seven to ten days if transferred from a non-U.S. financial institution). Contact the transferring financial institution if the shares aren't in your account after seven to ten business days.

To reach Merrill about the deposit, call [877.767.2404](tel:877.767.2404) or [855.224.2541](tel:855.224.2541), or [609.818.8894](tel:609.818.8894) or [609.450.1857](tel:609.450.1857) if located outside the United States, Puerto Rico or Canada.



Choose your sale order type

When you sell company stock (including when exercising Stock Options), you must decide when you want the sale to take place — at the next available sale price (a “market order”) or at a specified price (a “limit order”).

If you want to...	Choose this method	How it works
Sell your shares at the next available sale price	Market Order	As soon as market conditions allow, your shares will be sold.
Set the price at which to sell your shares...	Limit Order (You must select one of the types below):	If the stock price reaches or exceeds your set limit price, shares are sold subject to market conditions. If the price is not met while the order is in effect, your order is cancelled and shares/options are available for future sale/exercise.
... on the current trading day	Day Limit Order	Order is in effect for the current trading day only. Orders entered after market close will be in effect for the next business day.
... over the next 180 calendar days	Good Till Cancelled Limit Order ⁸	Order is in effect for 180 calendar days following the date of entry. For orders entered after the market close but before 12 midnight Eastern, the 180-day count begins two business days after the order is entered.

⁸ Please note that you cannot place a Good Till Cancelled order in connection with a cashless hold exercise.

Sale orders

- Merrill will execute all sale orders subject to market conditions.
- You may receive partial execution of the sale order you place, resulting in only a portion of your Stock Options being exercised/shares being sold. Once your exercise/order has been entered, you should check the confirmation on Benefits OnLine to determine the number of Stock Options exercised/shares sold.
- If you placed a Good Till Cancelled cashless sell exercise order and partial execution occurs, the unsold portion will remain open and available for execution so you won't need to re-enter the order for the balance of the option not exercised. Please note that for all other exercise types, you may need to re-enter the order if partial execution occurs.

Company blackouts

- Generally, all limit orders related to Stock Option exercises will be cancelled at the outset of a blackout period (a period set by your company during which purchases and sales of company stock are prohibited). Generally, no Stock Option exercises will be processed online during a blackout period.
- No new orders related to Stock Option exercises may be placed online or over the phone during a blackout period.
- Any and all blackout periods are determined by your company and are subject to change.

NOTE: For plans that only have Restricted Awards (no Stock Options), delete the third bullet in the “Sale orders” section and delete the first and second bullets in the “Company blackouts” section on this page. Also delete “options” and “exercise” from the table on this page, along with the footnote.

Also, please check numbering of footnotes if you have deleted pages or added/changed award content.



How to sell company stock

Get step-by-step instructions for selling some or all of your shares from your equity awards on Benefits OnLine. Visit go.ml.com/eqss.

Service fees

Transaction fees

Award recipients are charged the following commissions when **exercising Stock Options** or selling company stock held in a Merrill brokerage account.

Service channel	Minimum	Transaction cost
Benefits OnLine website and app	\$0	\$0
Participant service representative	\$50.00	\$0.06 per share
Financial advisor team	\$50.00	\$0.06 per share

The minimums and transaction costs are on a per-grant basis.

Participants selling large blocks of shares (e.g., 10,000 or more) may benefit by consulting a Merrill representative prior to executing the transaction. Large blocks of shares sold through Merrill's Special Equities Trading group may result in a more favorable execution price when compared to the online system. However, there is no guarantee that a representative will be able to obtain a more favorable execution price.

Other fees*

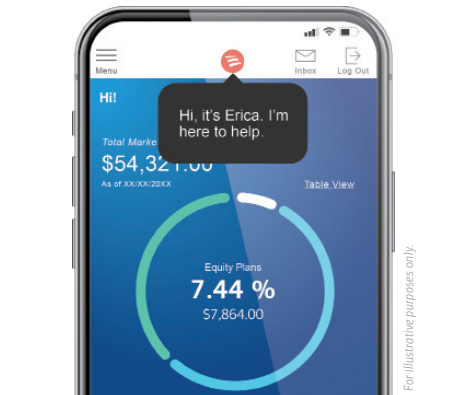
Account	Cost	Important information
Limited Individual Investor Account (LIIA) or, for Section 16 persons, Individual Investor Account (IIA)	No fee for active participants \$65 annual fee for inactive participants with cash and/or securities balance	Active participants include anyone with grants outstanding or eligible to receive future grants. Contact a participant service representative for more information.
Service	Cost	Important information
Direct deposit	No fee	Applies to cash proceeds at time of transaction deposited into a U.S.-based checking or savings account.
Wire transfer	\$7.50**	Wire transfers may not be available in all currencies.
Checks		
U.S. dollars	No fee	
Non-U.S. dollars	\$15.00**	Checks may not be available in all currencies.
Stock certificate/ DRS statement requests	Contact a participant service representative	Fees vary depending on your company's participation in the Direct Registration System (DRS) at the Depository Trust Company.
SEC transaction fee (as of February 23, 2023)	\$0.0080 for each \$1,000.00 or fraction thereof	Fee assessed and paid to the Securities and Exchange Commission (SEC) on each stock sale. Fee is subject to change by the SEC.
Brokerage account transfer (DTC transfer)	No fee for active participants	Applies only to Depository Trust Company (DTC) transfer of assets to another broker. Contact a participant service representative for more information.
Duplicate confirmations	\$5.00 per hard copy	Excludes transactions within the last six months. Available online at no cost.
Duplicate statements	\$5.00 per hard copy	Excludes the two most recent statements. Available online at no cost.

** You will be subject to the applicable fees, terms and conditions associated with the retail brokerage account established in connection with your equity award program. All brokerage account fees are subject to change upon notification to you.

** Requests made outside of the AwardChoice® system (Benefits OnLine, participant service representatives or a financial advisor) are subject to retail brokerage wire transfer fees.

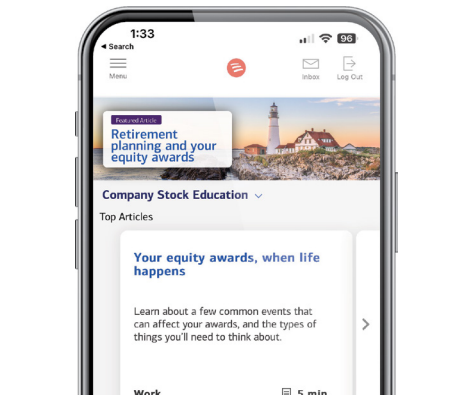
Commissions and account fees for transactions and services unrelated to your company equity awards plan are subject to standard Merrill rates. Please speak with a participant service representative for more information.

Helpful resources



Erica®

*Your virtual financial assistant is ready to help. Check out all that Erica can do for you on the Benefits OnLine app.**



Education Center

go.ml.com/equityed

Explore helpful articles, videos and other resources, including a Company Stock section specific to equity awards.



Events Center

go.ml.com/events

Register for upcoming financial webinars and explore the on-demand library of seminars and audiocasts.

*The app is designed to work with most mobile devices in most countries. The mobile feature, Erica, is only available in the English language. Carrier fees may apply.

This booklet contains certain descriptions of plan features as they exist at the time of final editing of the booklet, Month 2023. While every effort has been made to ensure the accuracy of the booklet, if there is any conflict between the information in the booklet and the official documents governing the plans and programs, the official documents will control. Nothing in the booklet is intended to create or affect an employment relationship between ABC Company, or its subsidiaries and affiliates, and any person. The sponsors of the plans and programs have reserved the right to amend or terminate any plan or program at any time, at the sole discretion of each, in accordance with the terms of the plan or program.

Neither ABC Company, Merrill nor any of its affiliates or financial advisors provide legal, tax, or accounting advice. You should consult your legal and/or tax advisors before making any financial decisions.

Merrill provides products and services to various employers, their employees and other individuals. In connection with providing these products and services, and at the request of the employer, Merrill makes available websites on the internet, mobile device applications, and written brochures in order to provide you with information regarding your plan. Under no circumstances should these websites, applications, and brochures, or any information included in these websites, applications, and brochures, be considered an offer to sell or a solicitation to buy any securities, products, or services from Merrill or any other person or entity.

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