



AS OF JUNE 30, 2025

OF THE CONDITION AND AFFAIRS OF THE

| | | | | | | |
|-----------------|-------------|-------------|-------------------|--------------|----------------------|-------------------|
| NAIC Group Code | <u>0836</u> | <u>0836</u> | NAIC Company Code | <u>99937</u> | Employer's ID Number | <u>31-1191427</u> |
| | (Current) | (Prior) | | | | |

Organized under the Laws of Ohio, State of Domicile or Port of Entry OH

Country of Domicile United States of America

Licensed as business type: Life, Accident and Health [X] Fraternal Benefit Societies []

Incorporated/Organized 09/08/1986 Commenced Business 07/01/1988

Statutory Home Office 400 East 4th Street, Cincinnati, OH, US 45202-3302
(Street and Number) (City or Town, State, Country and Zip Code)

| | |
|---------------------------------------------|--------------------------------|
| Main Administrative Office | 400 East 4th Street |
| | (Street and Number) |
| Cincinnati, OH, US 45202-3302 | 513-361-6700 |
| (City or Town, State, Country and Zip Code) | (Area Code) (Telephone Number) |

Mail Address 400 East 4th Street Cincinnati, OH, US 45202-3302
(Street and Number or P.O. Box) (City or Town, State, Country and Zip Code)

| | |
|------------------------------------------------------------------------------|------------------------------------------------|
| Primary Location of Books and Records | 400 East 4th Street (Street and Number) |
| Cincinnati, OH, US 45202-3302 (City or Town, State, Country and Zip Code) | 513-361-6700 (Area Code) (Telephone Number) |

Internet Website Address www.ColumbusLife.com

| | | |
|-----------------------------|-------------------------------------|--------------------------------|
| Statutory Statement Contact | Wade Matthew Fugate | 513-629-1402 |
| | (Name) | (Area Code) (Telephone Number) |
| | CompAcctGrp@WesternSouthernLife.com | 513-629-1871 |
| | (E-mail Address) | (FAX Number) |

OFFICERS

| | | | |
|-----------------------|--------------------------------|-----------------------|---------------------------------|
| Chairman of the Board | <u>John Finn Barrett</u> | Secretary and Counsel | <u>Donald Joseph Wuebbeling</u> |
| President & CEO | <u>John Henry Bulterma III</u> | | |

OTHER


| | | |
|-----------------------------------------------------|----------------------------------------------------|--------------------------------------------------------|
| James Howard Acton Jr., VP, Chief Financial Officer | Charles Marion Ward Barrett, VP | Matthew Edward Canterbury, Sr VP |
| James Daniel Conklin, VP | Lisa Beth Fangman, Sr VP | James Jeffrey Fitzgerald, Sr VP, Chf Information Off |
| Wade Matthew Fugate, VP, Controller | Daniel Eugene Haneline, VP | David Todd Henderson, Sr VP, Chf Acty, Risk, Data Off |
| Kevin Louis Howard, VP, Deputy Gen Counsel | Bradley Joseph Hunkler, Sr VP | Stephen Gale Hussey, Jr., Sr VP |
| Mark Daniel Hutchinson, VP | Jay Vincent Johnson, VP, Treasurer | Linda Marie Lake, Sr VP |
| Bruce William Maisel, VP, Enterprise CCO | David Edward Nevers, VP | Jonathan David Niemeyer, Sr VP & Gen Counsel |
| Justin Keith Payne, VP | Ryan Keith Richey, VP, CAO | Christopher David Shipley, Sr VP, Co-Chief Inv Officer |
| Paul Charles Silva, Sr VP | Rodrick Landon Snyder, VP, Chief Audit Officer | Jacob Cole Steuber, VP |
| Beady Bennette Waddell, VP | Brendan Matthew White, Sr VP, Co-Chief Inv Officer | Scott Joseph Wittman, VP |
| Aaron Jason Wolf, VP, Chief Underwriter | | |


DIRECTORS OR TRUSTEES


| | | |
|-------------------------|------------------------|-------------------------|
| John Finn Barrett | John Henry Bultema III | Jill Tripp McGruder |
| Jonathan David Niemeyer | James Joseph Vance | Donald Joseph Wuebbling |

State of Ohio SS:
County of Hamilton

The officers of this reporting entity being duly sworn, each depose and say that they are the described officers of said reporting entity, and that on the reporting period stated above, all of the herein described assets were the absolute property of the said reporting entity, free and clear from any liens or claims thereon, except as herein stated, and that this statement, together with related exhibits, schedules and explanations therein contained, annexed or referred to, is a full and true statement of all the assets and liabilities and of the condition and affairs of the said reporting entity as of the reporting period stated above, and of its income and deductions therefrom for the period ended, and have been completed in accordance with the NAIC Annual Statement Instructions and Accounting Practices and Procedures manual except to the extent that: (1) state law may differ; or, (2) that state rules or regulations require differences in reporting not related to accounting practices and procedures, according to the best of their information, knowledge and belief, respectively. Furthermore, the scope of this attestation by the described officers also includes the related corresponding electronic filing with the NAIC, when required, that is an exact copy (except for formatting differences due to electronic filing) of the enclosed statement. The electronic filing may be requested by various regulators in lieu of or in addition to the enclosed statement.


John H. Bultema III
President & CEO


Donald Joseph Wuebbeling
Secretary and Counsel


Wade Matthew Fugate
VP and Controller

a. Is this an original filing? ☐ Yes ☒ No ☐ Not sure

Subscribed and sworn to before me this
23rd day of July, 2025
Angela M. Baker-Coleyer



ANGELA M. BAKER-COLYER
Notary Public, State of Ohio
My Commission Expires
June 17, 2027