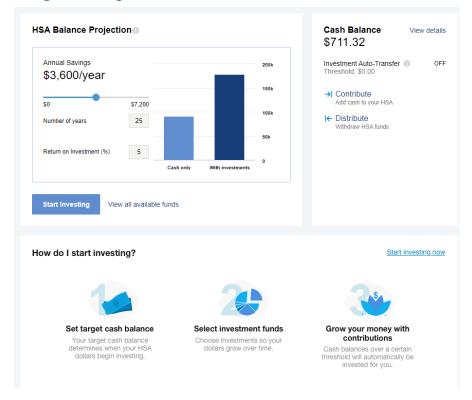
Set Up Your HSA Investments

You will need to maintain a minimum of \$1,000.00 in the default cash investment. Once your balance is above the required minimum you may elect to move some of your funds into the investment options available within your plan. In order to set up your funds in excess of \$1,000 (or more if you prefer) to move into the investment options you've set up, you must first define an investmentsweep amount.

1. To set the investment sweep amount, choose Accounts and select Investment Summary

Select Start Investing or Set target Cash balance.



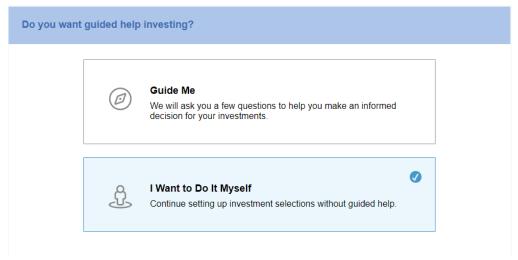
Be sure to turn auto-investment transfers on, and select the cash threshold amount.



Investment Transfer Threshold (Step 1 of 3) You are eligible to invest a portion of the funds from your health saving account into an investment account. By setting your investment transfer threshold below, we will automatically transfer funds into the investment account once your available cash balance exceeds the transfer threshold amount by \$100.01 or more. Likewise when your available cash account balance falls below the transfer threshold by \$100.01 or more, funds will be automatically transferred back to your cash account from your investment account. Your investment transfer threshold may be set equal to or above \$2000. Please enter a value that is an increment of 100. Would you like auto-investment transfers on? • Yes • No Transfer Funds to Investment When My Cash Balance Exceeds: \$ 2000 Investment Services: Not FDIC Insured • No Bank Guarantee • May Lose Value

Hit **Save and Next** and after that point any contributions in excess of your threshold willsweep into your preselected investment options.

2. Once the investment sweep amount is set and saved, you will be prompted to Setup Investments. You may select your own Investments and allocation % or you can choose a guided selection. Select which method you prefer by clicking on the box and then click Next



3. You will be walked through the pre-selected funds if you selected Guide Me. I Want to Do It Myself will bring you to select the funds and allocation % for your investments (Be sure total allocation equals 100%). Click Submit to complete your Setup.





We care about how we can help.

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Investments / Change Investments

Change Future Elections

Changes you make on this page will update your future elections only. When new money moves into your investment account, your new selections will control how it is invested.

FUND NAME	TICKER	BALANCE	CURRENT %	
+ MY GROWTH IPM	IPM-001	\$0.00	10 %	%
+ OPPENHEIMER DEVELOPING MKT Y	ODVYX	\$0.00	20 %	%
+ PIMCO LOW DURATION INTSL	PTLDX	\$0.00	20 %	%
+ OPP MAIN SM CAP	OPMSX	\$0.00	20 %	%
+ PIMCO COMMODITY REAL RETURN	PCRIX	\$0.00	20 %	%
+ THORNBURG INTL VALUE	TGVAX	\$0.00	10 %	%
+ BLACKROCK EQUITY DIVIDEND CL I	MADVX	\$0.00	0 %	%
Total		\$0.00	100 %	0 %

