

HSA Investment Options

INTEREST BEARING OPTION				Category	Annual Percentage Rate	Annual Percentage Yield (APY)					
HealthcareBank Interest Bearing Account				Cash Equivalent	0.25%	0.25%					
<i>FDIC Insured - Bank Guaranteed</i>											
MUTUAL FUND OPTIONS				Category	Symbol	Resource Links	Mutual Fund Returns as of May 31, 2019				
							YTD	3 Year Return	5 Year Return	10 Year Return	Expense Ratio
American Funds American Balanced	Allocation--50% to 70% Equity			AMBFX	P	M	6.35%	8.00%	6.93%	10.80%	0.38
American Funds Capital Income Bldr	World Allocation			CAIFX	P	M	6.26%	4.89%	3.53%	7.88%	0.40
DFA US Large Cap Value	Large Value			DFLVX	P	M	5.73%	8.23%	6.08%	13.34%	0.37
Vanguard 500 Index	Large Blend			VFIAX	P	M	10.73%	11.68%	9.63%	13.92%	0.04
American Funds Growth Fund of Amer	Large Growth			GFFFX	P	M	10.63%	13.45%	10.58%	13.58%	0.42
Vanguard Mid Cap Index	Mid-Cap Blend			VIMAX	P	M	13.81%	9.77%	7.98%	14.37%	0.05
JPMorgan Market Expansion Enh Idx	Small Blend			PGMIX	P	M	7.12%	6.98%	6.53%	13.37%	0.62
Neuberger Berman Mid Cap Growth	Mid-Cap Growth			NBMLX	P	M	18.58%	14.02%	10.28%	14.33%	0.71
Vanguard Small Cap Index	Small Blend			VSMAX	P	M	11.64%	9.95%	7.30%	14.15%	0.05
Vanguard Small Cap Growth Index	Small Growth			VSGAX	P	M	15.59%	13.05%	8.67%	14.86%	0.07
Northern Small Cap Value	Small Value			NOSGX	P	M	7.27%	5.86%	5.15%	12.02%	1.13
Vanguard Total Intl Stock Index	Foreign Large Blend			VTIAX	P	M	7.04%	6.57%	1.51%	5.85%	0.11
American Funds Europacific Growth	Foreign Large Growth			AEPFX	P	M	10.22%	7.65%	3.21%	7.18%	0.58
Fidelity Advisor Diversified Intl	Foreign Large Growth			FDVIX	P	M	10.78%	5.31%	2.74%	7.36%	0.92
Vanguard Emerging Mkts Stock Idx	Diversified Emerging Mkts			VEMAX	P	M	6.34%	9.14%	1.79%	4.75%	0.14
Vanguard Total World Stock Index	World Large Stock			VTWAX	P	M	9.23%	9.20%	5.45%	9.59%	0.10
Loomis Sayles Global Allocation	World Allocation			LSWWX	P	M	12.04%	9.75%	6.94%	11.05%	0.91
Vanguard Target Retirement 2020	Target-Date 2020			VTWNX	P	M	7.09%	6.67%	5.05%	8.76%	0.13
Vanguard Target Retirement 2030	Target-Date 2030			VTHRX	P	M	8.01%	7.80%	5.60%	9.84%	0.14
Vanguard Target Retirement 2040	Target-Date 2040			VFORX	P	M	8.67%	8.80%	6.00%	10.57%	0.14
Vanguard Target Retirement 2050	Target-Date 2050			VFIFX	P	M	8.89%	8.91%	6.06%	10.59%	0.15
Vanguard Target Retirement 2060	Target-Date 2060+			VTTSX	P	M	8.85%	8.90%	6.02%	N/A	0.15
Vanguard Target Retirement Income	Target-Date Retirement			VTINX	P	M	5.74%	4.68%	3.79%	6.11%	0.12

Nuveen Real Estate Securities	Real Estate	FARCX	P	M	16.58%	5.97%	7.56%	14.90%	1.02
Templeton Global Bond	World Bond	TGBAX	P	M	1.65%	4.45%	1.37%	4.80%	0.77
Lord Abbett High Yield	High Yield Bond	LAHYX	P	M	8.42%	6.86%	4.74%	9.61%	0.70
Vanguard Inflation-Protected Secs	Inflation-Protected Bond	VAIPX	P	M	5.19%	2.39%	1.58%	3.51%	0.10
Vanguard Interm-Term Bond Index	Intermediate Core Bond	VBILX	P	M	6.07%	2.72%	3.12%	5.04%	0.07
PIMCO Total Return	Intermediate Core-Plus Bond	PTTRX	P	M	4.94%	3.27%	2.88%	4.65%	0.55
Vanguard Total Bond Market Index	Intermediate Core Bond	VBTLX	P	M	4.89%	2.48%	2.68%	3.75%	0.05

Not FDIC Insured - No Bank Guarantee - May Lose Value

Resource Links: P - Prospectus, M - Morningstar®

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