

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 February 29, 2020				
					YTD	3 Year Return	5 Year Return	10 Year Return	Expense Ratio
American Funds American Balanced	Allocation--50% to 70% Equity	AMBFX	P	M	-3.93%	7.56%	7.01%	9.85%	0.38
American Funds Capital Income Bldr	World Allocation	CAIFX	P	M	-6.23%	4.33%	3.53%	6.88%	0.38
DFA US Large Cap Value	Large Value	DFLVX	P	M	-14.25%	2.66%	4.98%	10.82%	0.37
Vanguard 500 Index	Large Blend	VFIAX	P	M	-8.27%	9.83%	9.19%	12.62%	0.04
American Funds Growth Fund of Amer	Large Growth	GFFFX	P	M	-4.34%	12.16%	10.70%	12.87%	0.41
Vanguard Mid Cap Index	Mid-Cap Blend	VIMAX	P	M	-8.98%	6.74%	6.39%	11.85%	0.05
JPMorgan Market Expansion Enh Idx	Small Blend	PGMIX	P	M	-12.93%	1.49%	4.60%	10.62%	0.62
Neuberger Berman Mid Cap Growth	Mid-Cap Growth	NBMLX	P	M	-4.50%	12.39%	8.68%	12.85%	0.71
Vanguard Small Cap Index	Small Blend	VSMAX	P	M	-10.52%	4.93%	5.75%	11.40%	0.05
Vanguard Small Cap Growth Index	Small Growth	VSGAX	P	M	-7.20%	10.30%	7.79%	12.68%	0.07
Northern Small Cap Value	Small Value	NOSGX	P	M	-15.06%	-1.70%	2.96%	9.02%	1.14
Vanguard Total Intl Stock Index	Foreign Large Blend	VTIAX	P	M	-9.81%	4.28%	2.55%	4.54%	0.11
American Funds Europacific Growth	Foreign Large Growth	AEPFX	P	M	-9.03%	6.87%	4.13%	6.24%	0.58
Fidelity Advisor Diversified Intl	Foreign Large Growth	FDVIX	P	M	-7.51%	7.18%	4.04%	6.91%	0.92
Vanguard Emerging Mkts Stock Idx	Diversified Emerging Mkts	VEMAX	P	M	-8.53%	4.45%	2.30%	3.08%	0.14
Vanguard Total World Stock Index	World Large Stock	VTWAX	P	M	-8.96%	7.01%	5.81%	8.36%	0.10
Loomis Sayles Global Allocation	World Allocation	LSWWX	P	M	-5.45%	9.72%	7.33%	9.78%	0.91
Vanguard Target Retirement 2020	Target-Date 2020	VTWNX	P	M	-3.01%	6.41%	5.21%	7.72%	0.13
Vanguard Target Retirement 2030	Target-Date 2030	VTHRX	P	M	-4.91%	6.91%	5.69%	8.59%	0.14
Vanguard Target Retirement 2040	Target-Date 2040	VFORX	P	M	-6.75%	7.17%	5.98%	9.20%	0.14
Vanguard Target Retirement 2050	Target-Date 2050	VFIFX	P	M	-7.62%	7.09%	5.98%	9.21%	0.15
Vanguard Target Retirement 2060	Target-Date 2060+	VTTSX	P	M	-7.60%	7.10%	5.96%	N/A	0.15
Vanguard Target Retirement Income	Target-Date Retirement	VTINX	P	M	-0.71%	5.37%	4.26%	5.68%	0.12

Nuveen Real Estate Securities	Real Estate	FARCX	P	M	-6.27%	4.57%	4.78%	11.08%	1.02
Templeton Global Bond	Nontraditional Bond	TGBAX	P	M	-0.90%	0.58%	1.11%	3.36%	0.77
Lord Abbett High Yield	High Yield Bond	LAHYX	P	M	-1.60%	4.35%	5.29%	7.52%	0.70
Vanguard Inflation-Protected Secs	Inflation-Protected Bond	VAIPX	P	M	3.13%	3.73%	2.75%	3.53%	0.10
Vanguard Interm-Term Bond Index	Intermediate Core Bond	VBILX	P	M	4.58%	5.67%	4.10%	4.99%	0.07
PIMCO Total Return	Intermediate Core-Plus Bond	PTTRX	P	M	3.97%	5.11%	3.66%	4.36%	0.71
Vanguard Total Bond Market Index	Intermediate Core Bond	VBTLX	P	M	3.87%	5.01%	3.53%	3.89%	0.05

Not FDIC Insured - No Bank Guarantee - May Lose Value

Resource Links: P - Prospectus, M - Morningstar®

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