

Health Savings Account (HSA) Sweep Account Mutual Fund Options

Investment Name	Ticker	Asset Category
Fidelity Govt. Money Market Fund	SPAXX	Money Market -Taxable
Lord Abbett Short Duration Income I	LLDYX	Short-Term Bond
Metropolitan West Total Return Bond I	MWTIX	Intermediate - Term Bond
Pioneer Bond Y	PICYX	Intermediate - Term Bond
Vanguard Total Bond Index Adm	VBTLX	Intermediate - Term Bond
PIMCO Income Instl	PIMIX	Multisector Bond
Lord Abbett High Yield I	LAHYX	High Yield Bond
JPMorgan Equity Income R6	OIEJX	Large Value
MFS Value R4	MEIJX	Large Value
Vanguard 500 Index Adm	VFIAX	Large Blend
T. Rowe Price Dividend Growth	PRDGX	Large Blend
Columbia Contrarian Core Adv	CORRX	Large Blend
American Funds Growth Fund of Am. R6	RGAGX	Large Growth
TIAA-CREF Large-Cap Growth Instl	TILGX	Large Growth
Victory Sycamore Established Value I	VEVIX	Mid-Cap Value
MFS Mid Cap Value R6	MVCKX	Mid-Cap Value
Vanguard Mid Cap Index Admiral	VIMAX	Mid-Cap Blend
JPMorgan Mid Cap Growth R6	JMGMX	Mid-Cap Growth
Pioneer Select Mid Cap Growth Y	GROYX	Mid-Cap Growth
American Century Small Cap Value R6	ASVDX	Small Value
Undiscovered Mgrs Behavioral Value R6	UBVFX	Small Value
Vanguard Small Cap Index Adm	VSMAX	Small Blend
Fuller & Thaler Behavioral Sm- Cap R6	FTHFX	Small Blend
JPMorgan Small Cap Equity R6	VSENX	Small Blend
Franklin Small Cap Growth R6	FSMLX	Small Growth
Hood River Small-Cap Growth Ret	HRSIX	Small Growth
Vanguard International Value Inv	VTRIX	Foreign Large Value
Parametric International Equity Instl	EIISX	Foreign Large Blend
Vanguard Total Intl. Stock Index Adm	VTIAX	Foreign Large Blend
Vanguard International Growth Adm	VWILX	Foreign Large Growth
American Funds Europacific Growth R6	RERGX	Foreign Large Growth
Vanguard Tax-Managed Balanced Adm	VTMFX	Conservative Allocation
American Funds Am. Balanced R6	RLBGX	Moderate Allocation
MFS Total Return R4	MSFJX	Moderate Allocation

These funds were not selected for or tailored to any investor's individual circumstances. Offering these funds are not intended to be a recommendation to invest or hold any of these funds. Investors should read the prospectus carefully and consider the fund's investment objectives, risks, charges, and expenses before investing.

Investing in certain funds involves special risks, such as those related to investments in foreign securities, small and mid-capitalization stocks, and high-yield securities.

- Excess balance can be invested in mutual funds.
- Mutual fund elections are made via the Truist Consumer Portal at [TruistHSAFlex.com](https://www.truisthsaflex.com).
- A link to set up Investment Sweeps will be available via the consumer portal.
- Automatic sweep investment elections are made with a minimum transfer amount of \$100 or more.
- All funds may be purchased at net asset value (NAV) without a front-end load. Redemption fees may apply.
- For fund prospectus information, please visit [TruistHSAFlex.com](https://www.truisthsaflex.com).

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For Mutual Fund Investments: Please consult the HSA Custodial Agreement and Disclosure for information concerning fees, expenses and dividends on the Mutual Fund Investment Options. For Brokerage Sub-Account Investments: Please consult the Brokerage Agreement for information concerning fees and expenses relating to investments and trades made via the Brokerage Sub-Account.

Your HSA funds may be held in a custodial deposit account at Truist Bank. While so deposited, the funds are FDIC-Insured to the extent provided by law. Securities, insurance and advisory products or services including mutual fund investments made through your Sweep Investment Sub-Account and investments in securities made through your Brokerage Sub-Account are: NOT A DEPOSIT • NOT FDIC-INSURED • NOT GUARANTEED BY A BANK • NOT INSURED BY STATE OR FEDERAL GOVERNMENT AGENCY • MAY GO DOWN IN VALUE.

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