



HSA Investment Options

INTEREST BEARING OPTION	Category	Annual Percentage Rate	Annual Percentage Yield (APY)
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HealthcareBank Interest Bearing Account

Cash Equivalent

0.10%

0.10%

FDIC Insured - Bank Guaranteed

MUTUAL FUND OPTIONS	Category	Symbol	Resource Links	Mutual Fund Returns as of February 28, 2022				
				YTD	3 Year Return	5 Year Return	10 Year Return	Expense Ratio

American Funds American Balanced	Allocation--50% to 70% Equity	RLBGX	P	M	-4.75%	11.44%	9.83%	10.22%	0.26
American Funds Capital Income Bldr	World Allocation	RIRGX	P	M	-2.42%	8.96%	7.22%	7.33%	0.26
DFA US Large Cap Value	Large Value	DFLVX	P	M	-2.19%	11.94%	9.45%	12.33%	0.32
Vanguard 500 Index	Large Blend	VFIAX	P	M	-8.02%	18.21%	15.14%	14.55%	0.04
American Funds Growth Fund of Amer	Large Growth	RGAGX	P	M	-13.23%	18.22%	16.27%	15.33%	0.30
Vanguard Mid Cap Index	Mid-Cap Blend	VMCIX	P	M	-8.78%	15.17%	12.42%	12.87%	0.04
JPMorgan Market Expansion Enh Idx	Small Blend	OMYGX	P	M	-5.17%	13.06%	9.96%	12.20%	0.35
Neuberger Berman Mid Cap Growth	Mid-Cap Growth	NBMLX	P	M	-12.59%	15.94%	15.43%	12.86%	0.67
Vanguard Small Cap Index	Small Blend	VSCIX	P	M	-7.12%	12.28%	10.97%	12.21%	0.04
Vanguard Small Cap Growth Index	Small Growth	VSGIX	P	M	-13.00%	11.50%	12.47%	12.05%	0.06
Northern Small Cap Value	Small Value	NOSGX	P	M	-3.38%	8.13%	5.93%	9.72%	1.13
Vanguard Total Intl Stock Index	Foreign Large Blend	VTSNX	P	M	-5.71%	8.19%	7.49%	5.79%	0.08
American Funds Europacific Growth	Foreign Large Growth	RERGX	P	M	-11.37%	9.46%	8.97%	7.42%	0.46
Fidelity Advisor Diversified Intl	Foreign Large Growth	FDVIX	P	M	-12.31%	12.02%	9.55%	8.29%	0.90
Vanguard Emerging Mkts Stock Idx	Diversified Emerging Mkts	VEMIX	P	M	-3.91%	7.19%	6.86%	3.32%	0.10
Vanguard Total World Stock Index	World Large-Stock Blend	VTWIX	P	M	-7.29%	13.45%	11.49%	10.11%	0.08
Loomis Sayles Global Allocation	World Allocation	LGMNX	P	M	-11.46%	10.44%	10.37%	8.73%	0.80
Vanguard Target Retirement 2020	Target-Date 2020	VTWNX	P	M	-4.64%	8.56%	7.50%	7.47%	0.08
Vanguard Target Retirement 2030	Target-Date 2030	VTHRX	P	M	-5.86%	10.28%	8.98%	8.81%	0.08
Vanguard Target Retirement 2040	Target-Date 2040	VFORX	P	M	-6.47%	11.83%	10.31%	9.94%	0.08
Vanguard Target Retirement 2050	Target-Date 2050	VFIFX	P	M	-6.89%	12.70%	10.90%	10.27%	0.08
Vanguard Target Retirement 2060	Target-Date 2060	VTTSX	P	M	-6.91%	12.69%	10.88%	10.27%	0.08

Vanguard Target Retirement Income	Target-Date Retirement	VTINX	P	M	-3.80%	6.64%	5.59%	5.07%	0.08
Nuveen Real Estate Securities	Real Estate	FARCX	P	M	-9.51%	10.21%	7.93%	9.53%	1.05
PIMCO International Bond (USD-Hdg)	World Bond-USD Hedged	PFORX	P	M	-2.37%	2.48%	2.92%	4.37%	0.52
Lord Abbett High Yield	High Yield Bond	LAHYX	P	M	-4.20%	4.88%	4.26%	6.10%	0.70
Vanguard Inflation-Protected Secs	Inflation-Protected Bond	VAIPX	P	M	-1.13%	7.38%	4.64%	2.67%	0.10
Vanguard Interm-Term Bond Index	Intermediate Core Bond	VBIMX	P	M	-2.98%	4.16%	3.27%	3.04%	0.05
PIMCO Total Return	Intermediate Core-Plus Bond	PTTRX	P	M	-2.86%	3.88%	3.21%	3.09%	0.47
Vanguard Total Bond Market Index	Intermediate Core Bond	VBTIX	P	M	-3.26%	3.35%	2.71%	2.44%	0.04

Not FDIC Insured - No Bank Guarantee - May Lose Value

Resource Links: P - Prospectus, M - Morningstar®

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