

Health Savings Account (HSA) Investment Options



Investment Name	Ticker	Asset Category
Fidelity Government Money Market Fund	SPAXX	Money Market –Taxable
Metropolitan West Low Duration Bond I	MWTIX	Short-Term Bond
Lord Abbett Short Duration Income I	LLDYX	Short-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 Inv	PRDGX	Large Blend
Columbia Contrarian Core Adv	CORRX	Large Blend
American Funds Growth Fund of Amer R6	RGAGX	Large Growth
Pioneer Fundamental Growth Y	FUNYX	Large Growth
Victory Sycamore Established Value I	VEVIX	Mid-Cap Value
Neuberger Berman M/C Intrinsic Value Inst	NBRTX	Mid-Cap Value
AMG Managers Fairpointe Mid Cap I	ABMIX	Mid-Cap Value
JP Morgan Mid Cap Value R6	JMVYX	Mid-Cap Blend

Investment Name	Ticker	Asset Category
Vanguard Mid-Cap Index Adm	VIMAX	Mid-Cap Blend
MassMutual Select Mid Cap Growth I	MEFZX	Mid-Cap Growth
Pioneer Select Mid Cap Growth Y	GROYX	Mid-Cap Growth
Northern Small Cap Value	NOSGX	Small Value
Undiscovered Managers Behavioral Value R6	UBVFX	Small Value
Vanguard Small Cap Index Adm	VSMAX	Small Blend
Goldman Sachs Small Cap Value Inst	GSSIX	Small Blend
JPMorgan Small Cap Equity R6	VSENX	Small Blend
Neuberger Berman Genesis R6	NRGSX	Small Growth
Voya SmallCap Opportunities I	NSPIX	Small Growth
AB International Value I	AIVIX	Foreign Large Value
Parametric International Equity Instl	EISX	Foreign Large Blend
Vanguard Total Intl Stock Index Adm	VTIAX	Foreign Large Blend
Neuberger Berman International Equity Instl	NBIIX	Foreign Large Growth
American Funds Europacific Growth R6	RERGX	Foreign Large Growth
Invesco Income Allocation R5	ILAAX	Conservative Allocation
American Funds American 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 <https://mcgriffinsurance.lh1ondemand.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 www.mcgriffinsurance.com/flex.

Your HSA funds may be held by McGriff Insurance Services, Inc. in a custodial deposit account at Branch Banking and Trust Company. While so deposited, the funds are FDIC-insured to the extent provided by law. Investment solutions are provided by McGriff Insurance Services, Inc. Advisory services are provided by Precept Advisory Group, LLC, a subsidiary of McGriff Insurance Services, Inc.

Please refer to the prospectus applicable to each mutual fund. Securities, insurance and advisory products or services 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.

McGriff Insurance Services and its representatives do not offer tax or legal advice. Please consult your tax or legal professional regarding your individual circumstances. © 2019, McGriff Insurance Services, Inc. All rights reserved.