



## Announcing enhancement for investing your Health Savings Account (HSA) dollars

We're excited to tell you about a new enhancement for investing your HSA dollars! We've made it easier for you to transfer funds to your investment account with our new recurring investment feature.

### Create a recurring investment plan

If you've opened an investment account, you can now schedule recurring transfers from your HSA to your investment account to take place once your HSA reaches a certain balance. With this feature, you can:

- **Specify the dollar amount at which funds should be transferred to your investment account.** Any amount above your specified balance will be automatically invested.
- **Choose the frequency a transfer should take place (weekly, monthly or quarterly).** If your HSA balance is less than your specified amount on a scheduled transfer day, we'll skip that day and won't transfer funds to your investment account.

We've updated our **HSA Investments Quick Reference Guide** to include this new feature. Visit the PayFlex member website to download a copy from the Resource Center under Educational Materials.

### Don't have an investment account?

Click [here](#) to view a short YouTube video about investing with your HSA. You can also find out if you're eligible to open an investment account through the PayFlex member website. After you log in, click on the **Financial Center** tab. Select your **Health Savings Account** from the drop down box. Then click on **Investments** on the left side. Here you'll see if you have met the minimum balance in order to start investing or how close you are to getting there.

### Questions?

If you have any questions, visit the PayFlex member website and click on **Contact Us** for our customer service phone number and hours of operation.

Sincerely,  
**PayFlex**

DO NOT REPLY TO THIS EMAIL. This was sent by an automated system. "Reply" messages are automatically deleted and will not receive a response.

This material is for informational purposes only. Information is believed to be accurate as of the production date; however, it is subject to change. For more information about PayFlex, go to [www.payflex.com](http://www.payflex.com).

Investment services are independently offered through a third party financial institution.

By transferring funds into an HSA investment account you can potentially benefit from capital appreciation in the value of mutual fund holdings. However, you will also be exposed to a number of risks, including the loss of principal amount invested, and you should always read the prospectuses for the mutual funds you intend on purchasing to familiarize yourself with these risks. Past performance is no guarantee of future results.

The HSA investment account is an optional, self-directed service. We do not provide investment advice for HSA investment account participants. You are solely responsible for any investment account decisions you make. Mutual funds and brokerage investments are not FDIC-insured and are subject to investment risk, including fluctuations in value and the possible loss of the principal amount invested. The prospectus describes the funds' investment objectives and strategies, their fees and expenses, and the risks inherent to investing in each fund. Investors should always read the prospectus carefully before making any investment decision.

System response and account access times may vary due to a variety of factors, including trading volumes, market conditions, system performance, and other factors.



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