

HSA Investment Choice Election



If you have already agreed to the *HSA Investment Option Agreement*, use this form to select investments for your Everence HSA. **Please print in dark ink** when completing this form. Fax the completed and signed form to (574) 537-3627 or mail it to Everence HSA Administration, P.O. Box 483, Goshen, IN 46527. For questions about HSA investment transactions, call (800) 348-7468 ext. 2460, or email hsaservice@everence.com.

Investment trading occurs each Tuesday or the next business day in the event of a holiday. This investment choice election must be received by 12 p.m. (noon) the day prior to the investment trading day. Requests received after this time will not be processed until the next investment trading day.

Account owner information

Name _____ HSA account number _____
First middle last

Investment threshold

Please enter the amount you wish to keep in your HSA share account before investing in mutual funds. The minimum balance (investment threshold) you must have in the HSA share account before you may invest additional amounts of \$500 or more in mutual funds is \$1,000. When your HSA share account balance exceeds your investment threshold by at least \$500, money is automatically invested according to your investment choices.

\$ _____ (\$1,000 minimum)

Investment choices

Enter the percentage (in whole numbers only) of your **future** contributions you wish to put into each mutual fund* once your HSA share account balance has reached your chosen investment threshold. The amount you list below must total 100 percent.

Percentages

Praxis Genesis Portfolios

Invests in a combination of the other Praxis Mutual Funds.

Conservative A _____
Balanced A _____
Growth A _____

Praxis Impact Bond Fund A

(formerly Praxis Intermediate Income Fund)

Invests primarily in corporate bonds, mortgage-backed securities, and related investments. _____

Praxis Value Index Fund A

Passively managed portfolio primarily investing in large value stocks. _____

Praxis Growth Index Fund A

Passively managed portfolio primarily investing in large cap growth stocks. _____

Praxis International Index Fund A

Invests in the stocks of foreign companies. _____

Total 100%

*HSA funds are invested in Class A shares with sales charges waived.

Signature

I authorize the above investment choice election for my HSA. I acknowledge receipt of the *HSA Investment Option Agreement* and agree to its terms and conditions.

Signature of account owner

Date

When investing, you should consider the investment objectives, risks, and the charges and expenses of each mutual fund carefully before investing. This and other information about the Funds is in the prospectus, which can be obtained at your local Everence Federal Credit Union branch or by calling (800) 348-7468 ext. 2460. Read the prospectus carefully before you invest.

Investment products offered are not NCUA/NCUSIF/FDIC or otherwise insured; are not obligations of the credit union; are not guaranteed by the credit union, Everence Trust Company, or Everence Insurance Company; and involve investment risks, including possible loss of principal.

Everence Federal Credit Union and Everence Insurance Company are not authorized to provide tax, investment, or legal advice with respect to health savings accounts. Please refer questions to your tax advisor, investment advisor, or accountant.

Everence Federal Credit Union

1110 N. Main St.
P.O. Box 483
Goshen, IN 46527
everence.com

Toll-free: (800) 348-7468
T: (574) 533-9511