

# Change of HSA Investment Choice Election



Use this form to change your investment choice election 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](mailto: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

## Change 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. **Note: No entry is required if you are not changing your investment threshold.**

\$ \_\_\_\_\_ (\$1,000 minimum)

Remove my investment threshold and disable automatic investments from my HSA share account.

## Change investment of future contributions

Enter the percentage (in whole numbers only) of your **future** contributions you wish to invest in 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
<b>Praxis Genesis Portfolios</b> Invests in a combination of the other Praxis Mutual Funds.	
Conservative A	_____
Balanced A	_____
Growth A	_____
<b>Praxis Impact Bond Fund A</b> <b>(formerly Praxis Intermediate Income Fund)</b> Invests primarily in corporate bonds, mortgage-backed securities, and related investments.	_____
<b>Praxis Value Index Fund A</b> Passively managed portfolio primarily investing in large value stocks.	_____
<b>Praxis Growth Index Fund A</b> Passively managed portfolio primarily investing in large cap growth stocks.	_____
<b>Praxis International Index Fund A</b> Invests in the stocks of foreign companies.	_____
<b>Total</b>	<b>100%</b>

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

## Reallocate existing fund balances

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As your long term investment goals and risk tolerance change, you may wish to adjust and reallocate the percentage of funds in your current investments. If you would like to change the allocations for your existing mutual funds, enter the percentage (in whole numbers only) of your **current total investment** you wish to have in each fund.\* The amount you list below must total 100 percent.

By reallocating your investments, you will move money between your existing Praxis Mutual Fund investments only.

	Percentages
<b>Praxis Genesis Portfolios</b> Invests in a combination of the other Praxis Mutual Funds.	
Conservative A	_____
Balanced A	_____
Growth A	_____
<b>Praxis Impact Bond Fund A</b> Invests primarily in corporate bonds, mortgage-backed securities, and related investments.	_____
<b>Praxis Value Index Fund A</b> Passively managed portfolio primarily investing in large value stocks.	_____
<b>Praxis Growth Index Fund A</b> Passively managed portfolio primarily investing in large cap growth stocks.	_____
<b>Praxis International Index Fund A</b> Invests in the stocks of foreign companies.	_____
	<b>Total            100%</b>

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

## Signature

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I authorize the above changes to be made to my investment choice election for my HSA.

\_\_\_\_\_  
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

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