



## HSA Investment Options

INTEREST BEARING OPTION				Annual Percentage Rate		Annual Percentage Yield (APY)						
Fund Name	Category											
<b>HealthcareBank Interest Bearing Account</b>	Cash Equivalent			0.20%		0.20%						
<i>FDIC Insured - Bank Guaranteed</i>												
MUTUAL FUND OPTIONS				Symbol		Resource Links		Mutual Fund Returns as of March 31, 2026				
Fund Name	Category							YTD	3 Year Return	5 Year Return	10 Year Return	Expense Ratio
<b>American Funds American Balanced</b>	Moderate Allocation	RLBGX	<a href="#">P</a>	<a href="#">M</a>	-0.22%	14.76%	8.72%	9.87%	0.25			
<b>American Funds Capital Income Bldr</b>	Global Allocation	RIRGX	<a href="#">P</a>	<a href="#">M</a>	2.34%	13.21%	8.57%	8.02%	0.27			
<b>DFA US Large Cap Value</b>	Large Value	DFLVX	<a href="#">P</a>	<a href="#">M</a>	5.06%	15.37%	9.71%	11.21%	0.23			
<b>Vanguard 500 Index</b>	Large Blend	VFIAX	<a href="#">P</a>	<a href="#">M</a>	-3.11%	18.80%	11.74%	14.22%	0.04			
<b>American Funds Growth Fund of Amer</b>	Large Growth	RGAGX	<a href="#">P</a>	<a href="#">M</a>	-6.91%	21.72%	9.35%	14.87%	0.29			
<b>Vanguard Mid Cap Index</b>	Mid-Cap Blend	VMCIX	<a href="#">P</a>	<a href="#">M</a>	0.84%	13.86%	6.74%	10.91%	0.04			
<b>Neuberger Berman Mid Cap Growth</b>	Mid-Cap Growth	NRMGX	<a href="#">P</a>	<a href="#">M</a>	-3.14%	12.99%	2.99%	11.38%	0.59			
<b>Vanguard Small Cap Index</b>	Small Blend	VSCIX	<a href="#">P</a>	<a href="#">M</a>	3.36%	14.53%	5.53%	10.76%	0.04			
<b>Vanguard Small Cap Growth Index</b>	Small Growth	VSGIX	<a href="#">P</a>	<a href="#">M</a>	2.22%	14.13%	2.40%	10.69%	0.06			
<b>Vanguard Small Cap Value Index</b>	Small Value	VSIAX	<a href="#">P</a>	<a href="#">M</a>	4.20%	14.73%	7.69%	10.36%	0.07			
<b>Vanguard Total Intl Stock Index</b>	Foreign Large Blend	VTSNX	<a href="#">P</a>	<a href="#">M</a>	3.20%	15.77%	7.41%	9.11%	0.06			
<b>American Funds Europacific Growth</b>	Foreign Large Growth	RERGX	<a href="#">P</a>	<a href="#">M</a>	-1.45%	12.36%	3.86%	8.69%	0.47			
<b>Fidelity Advisor Diversified Intl</b>	Foreign Large Growth	FDVIX	<a href="#">P</a>	<a href="#">M</a>	1.02%	14.12%	6.30%	8.88%	0.87			
<b>Vanguard Emerging Mkts Stock Idx</b>	Diversified Emerging Mkts	VEMIX	<a href="#">P</a>	<a href="#">M</a>	0.68%	13.68%	3.69%	7.90%	0.09			
<b>Vanguard Total World Stock Index</b>	Global Large-Stock Blend	VTWIX	<a href="#">P</a>	<a href="#">M</a>	-0.56%	17.37%	9.28%	11.74%	0.07			
<b>Loomis Sayles Global Allocation</b>	Global Allocation	LGMNX	<a href="#">P</a>	<a href="#">M</a>	-0.51%	13.60%	5.76%	9.16%	0.82			
<b>Vanguard Target Retirement 2020</b>	Target-Date 2020	VTWNX	<a href="#">P</a>	<a href="#">M</a>	0.11%	8.98%	4.25%	6.73%	0.08			
<b>Vanguard Target Retirement 2030</b>	Target-Date 2030	VTHRX	<a href="#">P</a>	<a href="#">M</a>	-0.17%	12.06%	5.92%	8.54%	0.08			
<b>Vanguard Target Retirement 2040</b>	Target-Date 2040	VFORX	<a href="#">P</a>	<a href="#">M</a>	-0.16%	14.24%	7.31%	10.07%	0.08			
<b>Vanguard Target Retirement 2050</b>	Target-Date 2050	VFIFX	<a href="#">P</a>	<a href="#">M</a>	-0.22%	16.14%	8.48%	10.97%	0.08			
<b>Vanguard Target Retirement 2060</b>	Target-Date 2060	VTTX	<a href="#">P</a>	<a href="#">M</a>	-0.21%	16.13%	8.49%	10.96%	0.08			
<b>Vanguard Target Retirement Income</b>	Target-Date Retirement	VTINX	<a href="#">P</a>	<a href="#">M</a>	0.12%	7.89%	3.64%	5.11%	0.08			
<b>TIAA-CREF Real Estate Securities</b>	Real Estate	TIREX	<a href="#">P</a>	<a href="#">M</a>	5.27%	7.88%	2.65%	6.15%	0.50			
<b>PIMCO International Bond (USD-Hdg)</b>	Global Bond-USD Hedged	PFORX	<a href="#">P</a>	<a href="#">M</a>	-1.20%	4.90%	1.37%	2.90%	0.57			

<b>BlackRock High Yield Portfolio</b>	<b>High Yield Bond</b>	<b>BRHYX</b>	<a href="#">P</a>	<a href="#">M</a>	<b>0.08%</b>	<b>9.18%</b>	<b>4.82%</b>	<b>6.36%</b>	<b>0.48</b>
<b>Vanguard Inflation-Protected Secs</b>	<b>Inflation-Protected Bond</b>	<b>VIPIX</b>	<a href="#">P</a>	<a href="#">M</a>	<b>0.63%</b>	<b>2.91%</b>	<b>1.45%</b>	<b>2.62%</b>	<b>0.07</b>
<b>Vanguard Interim-Term Bond Index</b>	<b>Intermediate Core Bond</b>	<b>VBIMX</b>	<a href="#">P</a>	<a href="#">M</a>	<b>-0.22%</b>	<b>3.60%</b>	<b>0.51%</b>	<b>2.04%</b>	<b>0.04</b>
<b>PIMCO Total Return</b>	<b>Intermediate Core-Plus Bond</b>	<b>PTTRX</b>	<a href="#">P</a>	<a href="#">M</a>	<b>-0.08%</b>	<b>4.58%</b>	<b>0.82%</b>	<b>2.36%</b>	<b>0.51</b>
<b>Vanguard Total Bond Market Index</b>	<b>Intermediate Core Bond</b>	<b>VBTIX</b>	<a href="#">P</a>	<a href="#">M</a>	<b>0.12%</b>	<b>3.27%</b>	<b>0.24%</b>	<b>1.68%</b>	<b>0.03</b>

*Not FDIC Insured - No Bank Guarantee - May Lose Value*

**Resource Links:** [P](#) - Prospectus, [M](#) - Morningstar®

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