

HEALTH SAVINGS ACCOUNT INVESTMENT ACCOUNT TRANSACTION FORM



Account Holder's Name and Address	Spending Account ID #																																																		
<div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> Last Name First Name Middle Initial </div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">Street Address</div> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> City State Zip </div> <div style="border-bottom: 1px solid black;">Email address</div>	<table style="width:100%; border-collapse: collapse;"> <tr> <td style="border: 1px solid black; width: 20px; height: 20px; text-align: center;">S</td> <td style="border: 1px solid black; width: 20px; height: 20px; text-align: center;">A</td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> <td style="border: 1px solid black; width: 20px; height: 20px;"></td> </tr> <tr> <td colspan="10" style="border: 1px solid black; text-align: center; padding: 5px;">Social Security # (if SA# is not known)</td> </tr> <tr> <td colspan="10" style="border: 1px solid black; height: 20px;"></td> </tr> <tr> <td colspan="10" style="border: 1px solid black; text-align: center; padding: 5px;">Daytime Phone</td> </tr> <tr> <td colspan="10" style="border: 1px solid black; height: 20px;"></td> </tr> </table>	S	A									Social Security # (if SA# is not known)																				Daytime Phone																			
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Open Investment Account

I wish to activate an Investment Account as part of my HSA.

- Please transfer \$ _____ from my Base Balance to my Investment Account.
I understand that the initial transfer will be invested in the Schwab Money Market fund, or another "money market" fund that is available, if the Schwab Money Market fund is not available.
- I would like to have _____% (0 to 100) of future contributions automatically go to my Investment Account. Any future contributions that are not transferred to my Investment Account will be added to my HSA Base Balance.

Please note: after your Basic Investment Account has been activated, you will be able to change the way that future contributions are allocated to the investment options and make exchanges between investment options. These activities are supported through a record keeping system which you can access through HorizonBlue.com. The record keeping system will also provide investment balance information by investment option and will provide access to information regarding the investment options. When you visit the record keeping system for the first time either on the web or by phone, you will be asked to log in using your social security number as your user name and the last four digits of your social security number as your personal identification number (PIN).

Transfer Instructions

I wish to transfer \$ _____

FROM: HSA Base Balance
 Basic Investment Account
 Charles Schwab Self-Directed Brokerage Investment Account # _____

NOTE: Prior to requesting a funds transfer from your Charles Schwab Self-Directed Brokerage Investment Account, you will need to liquidate individual securities to the cash position in your Charles Schwab Self-Directed Investment Account.

TO: HSA Base Balance
 Basic Investment Account
 Charles Schwab Self-Directed Brokerage Investment Account # _____

Funds transferred from the Basic Investment Account will be liquidated on a pro-rata basis according to your current asset alignments. You must open a Charles Schwab Self-Directed Brokerage Investment Account prior to requesting any transfers.

Signature

I understand if my HSA Base Balance should fall below \$1,000 due to distribution activity, then future contributions will first be used to build the Base Balance back up to \$1,000. If my HSA Base Balance should fall below \$1,000 due to distribution activity, assets will NOT automatically be transferred from the investment account to the HSA Base Balance.

Account Owner Signature
Date

Save time: submit this information online. Questions? Call Member Services at 1-888-215-0025.

Submit online: Log into your account at HorizonBlue.com	Send via secured email only: HorizonMyWay.Documents@Hellofurther.com	Fax to: 866-231-0214	Mail to: P.O. Box 64193 St. Paul, MN 55164-0193
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