



# A modern and personalized HSA investment experience for your employees

## A next-generation investment experience

We are excited to announce that soon, your employees will have access to a new and modern approach to HSA investing that allows them to personalize their investment journey to fit their unique needs and experience level. With the WealthCare Saver investment solution, your employees will be able to choose from three different investment models – Managed, Self-Directed and a first-of-its-kind Brokerage option – all of which are designed to help them work toward their long-term investing goals. Best of all, it's fully integrated with the Acrisure HSA solution, which means your employees can manage all aspects of their HSA, including their investments, from a single portal.

## Three different models ensure a personalized approach to investing

**Managed:** Designed for novice investors who prefer to have our advisor tool automatically select and rebalance investments on an ongoing basis in accordance with their age and/or risk profile. This account type delivers a “do-it-for-me” approach to investing.

**Self-Directed:** Designed for intermediate investors who have the desire to self-select from a menu of monitored investment options covering multiple asset classes to diversify their portfolio, and then rebalance their portfolio manually. This account type provides a balance between do-it-for-me and DIY approaches to investing.

**Brokerage:** Designed for adept investors who desire to perform advanced research and trading across hundreds of individual stocks and exchange-traded funds (ETFs). This account type offers a hands-on, DIY approach to investing.

## Key benefits

- You will be able to deliver a unique HSA experience that supports your employees through all stages of healthcare transactions – spending, saving and investing.
- You will be able to provide your employees with an integrated, modern HSA investment solution that not only helps them understand the value of investing but also helps them work toward their long-term investing goals.
- Whether your employees are new to investing and seeking a guided experience or seasoned investors looking to research and trade stocks and ETFs available on the platform, you will be able to offer them an HSA investment journey that is aligned with their individual needs.
- HSA investment accounts are opened in real time, transactions are made in real time and account data is viewed in real time, which means your employees will have full transparency into their assets and allocations.

The balance in your HSA Investment Account is subject to investment risks, including fluctuations in value and the possible loss of the principal amount invested. Investing through the WealthCare Saver investment platform is subject to the terms and conditions of the Health Savings Account Custodial Agreement and any applicable investment supplement(s). For information regarding underlying investment expenses, earnings, and distributions, see the applicable investment prospectus and other publicly available information.

WealthCare Saver, a dba of Alegeus Technologies, LLC, is a licensed Non-Bank Custodian of HSA cash accounts.

CapFinancial Partners, LLC (“CAPTRUST”) is an investment adviser registered under the Investment Advisers Act of 1940. CAPTRUST acts as investment advisor with respect to the investments available in your HSA. In addition, you may choose to have CAPTRUST manage your HSA account on a discretionary basis.

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