

# HEALTH SAVINGS ACCOUNT INVESTMENT ACCOUNT TRANSACTION FORM



Account Holder's Name and Address			Spending Account ID #							
Last Name	First Name	Middle Initial	S	A						
Street Address			Social Security # (if SA# is not known)							
City			Daytime Phone							
State										
Zip										
Email address										
<b>Open Investment Account</b>										
<p><input type="checkbox"/> I wish to activate an Investment Account as part of my HSA.</p> <ul style="list-style-type: none"> <li>Please transfer \$ _____ from my Base Balance to my Investment Account.</li> </ul> <p>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.</p> <ul style="list-style-type: none"> <li>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.</li> </ul> <p>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).</p>										
<b>Transfer Instructions</b>										
<p>I wish to transfer \$ _____</p> <p>FROM: <input type="checkbox"/> HSA Base Balance  <input type="checkbox"/> Basic Investment Account  <input type="checkbox"/> Charles Schwab Self-Directed Brokerage Investment Account # _____</p> <p><b>NOTE:</b> 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.</p> <p>TO: <input type="checkbox"/> HSA Base Balance  <input type="checkbox"/> Basic Investment Account  <input type="checkbox"/> Charles Schwab Self-Directed Brokerage Investment Account # _____</p> <p>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.</p>										
<b>Signature</b>										
<p>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.</p>										
_____ 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:**  
PO Box 860684  
Minneapolis, MN  
55486-0684

**Overnight:**  
Lockbox 860684  
1200 Energy Park Dr  
St Paul, MN  
55108-0684