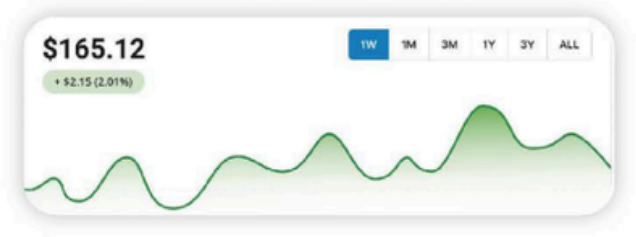
DRIVEN 125
BENEFIT ADMINISTRATORS

New HSA Brokerage Account Overview

Complete Control

Our brokerage account gives you more choice and control over your investments by allowing you to easily invest in thousand of equities and ETFs, helping you meet your financial goals and helping make healthcare more affordable. It comes with the following features:

- Real-time enrollment via the consumer portal
- Seamless access via both the consumer portal and mobile app
- Search, research, buy and sell individual securities and ETFs directly from your HSA cash balance
- Purchase fractional shares
- No trading fees
- Review investment performance, transaction history, monthly statements and trade confirmations



Have full control over how and when you buy and sell your investments, including fractional shares. After meeting the minimum cash balance, you can buy equities and ETFs in real time with as little as $5.

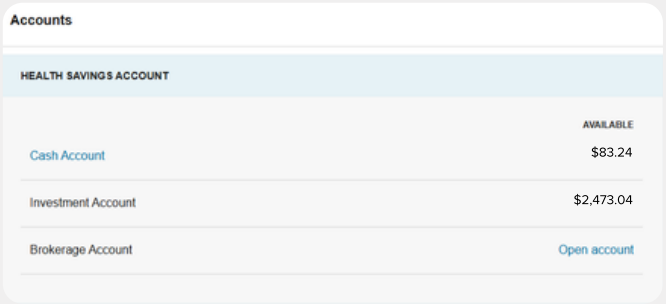
Seamless Setup

Start your investment journey in just five easy steps. The brokerage account is available for all HSAs, including first-time investors. The pre-populated contact information makes it easy for everybody to get started.

- Verify your pre-populated contact information
- Confirm your employment status
- Provide stock exchange information
- Review and agree to disclosures
- Review automatic transfer information

Fully Integrated

Access and manage your brokerage account directly in the consumer portal and mobile app.

Get Started Today

To get started, log in to your Consumer Portal and, under Accounts, click “Open Account” next to Brokerage Account.