



**DEVENIR**

**FEATURES**

# Solution Comparison

**myHSAinvestments SOLUTION**

**Custom-Branded SOLUTION**

	myHSAinvestments	Financial Institution
<b>Branding</b>		
<b>Mutual fund options</b> <small>(All no-load/load waived)</small>	30+	Customizable
<b>Links to mutual fund research</b>	✓	✓
<b>Mutual Fund Performance Dashboard</b> <small>(Updated monthly)</small>	✓	✓
<b>Leading educational tools and resources</b>	✓	✓
<b>No investment minimums</b>	✓	✓
<b>No investment transaction fees</b>	✓	✓
<b>HSA Guided Portfolio</b> <small>(Includes automatic rebalancing)</small>	✓	Optional
<b>Electronic prospectuses</b>	✓	✓
<b>Electronic enrollment</b>	✓	✓
<b>Electronic money transfers</b>	✓	✓
<b>Customer service support</b>	✓	✓
<b>Automated daily enrollment and balance file transmissions</b>		✓
<b>Plan access website for custodians</b>		✓
<b>Quarterly investment performance review</b>		✓
<b>Custom account holder e-statements</b>		✓
<b>Single sign-on capabilities</b>		✓
<b>Web service functionality</b>		✓
<b>Self-directed brokerage account compatible</b>		✓
<b>Sales &amp; marketing support</b>		✓
<b>Typical HSA program size</b>	<10,000 HSA Accounts	>10,000 HSA Accounts
<b>Cost (to institution)</b>	\$0	Contact for pricing
<b>Cost (to account holder)*</b>	0.50% annual fee	0.50% annual fee

\*Assessed at 0.125% of HSA investment assets per quarter

The features and fees listed may be subject to change. Neither your HSA provider, nor Devenir Group, LLC, provide HSA investment advice to individual account holders. Investments are not guaranteed and may lose value. Once money transfers from an HSA to HSA investments, these dollars are no longer covered by applicable FDIC or NCUA insurance.