



WealthCare Saver Investment Solution: Sample Employee Email

Use the following email to communicate to employees the exciting changes coming to their HSA investment solution. Delivery of this communication is not required – it was designed to familiarize your employees with the upcoming changes and reduce inquiries when existing investors receive formal communications from their custodian, WealthCare Saver, about the transition.

Suggested Email Subject Line: New HSA Investment Solution Coming Soon

We are happy to announce that our health savings account (HSA) provider, The Difference Card, will soon launch a new HSA investment experience – the WealthCare Saver investment solution. Benefits include an enhanced experience, new investment models designed to fit your needs, real-time account opening, and the ability to manage all aspects of your HSA, including your investments, from a single location.

If you do NOT already have an HSA investment account, be sure to take a look at the attached FAQ and overview document for more information regarding your opportunity to open an investment account with the new solution.

If you have an HSA investment account that was opened prior to January 5, 2022, you can expect to receive a communication from your HSA custodian, WealthCare Saver, regarding the specifics of your transition to the new investment solution. You will receive this communication approximately 30 days prior to your transition, which is scheduled to occur on May 23, 2022 - May 27, 2022. To provide you advanced notice and help avoid any potential confusion when you receive the letter, please review the attached FAQ.

We are excited about the new investment solution capabilities and believe it will enhance your HSA experience. If you have any questions about this update, please contact (888) 343-2110.

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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