

Investment Enrollment Form

Please complete this enrollment form and return to your Plan Service Provider (PSP) as indicated on the bottom of this form.

PARTICIPANT INFORMATION (Please Print)

Name: (First) _____ (MI) _____ (Last) _____

Street Address: _____

City: _____ State: _____ Zip Code: _____

Home Phone: _____ Work Phone: _____

Email Address: _____ Social Security Number: _____

EMPLOYER CODE

Employer Code: _____

HSA INVESTMENT AMOUNT

Please invest \$ _____ from my Health Savings Account in the model I have selected below.

HSA INVESTMENT ELECTIONS

Select your model or create a custom model from the list of funds on the next page.

Conservative Growth Model*



Balanced Growth Model*



Custom Model

(choose the funds from the list on the next page)

Moderate Growth Model*



Aggressive Growth Model*



* All Models are Subject to Change

PARTICIPANT AUTHORIZATION

Signature: _____ Date: _____

By signing above, I acknowledge that I have read and understand the "Investment Notice" located on the next page.

PLAN SERVICES PROVIDED BY

PSP: _____ Phone: _____

Address: _____ Email: _____

CUSTOM ELECTIONS

To create your custom model, enter the percentage you want to invest in each fund in the chart below. Enter zero if you do not want to put money in a fund. Total must equal 100%.

Fund Options	Ticker	Asset Class	Security type	Percentage
Ariel Appreciation	CAAPX	Domestic Stock	Mid-Cap Blend	%
Century Small Cap Select	CSMVX	Domestic Stock	Small Growth	%
Davis Real Estate	RPRFX	Real Estate	Specialty-Real Estate Investment Trusts	%
Gabelli Equity Income AAA	GABEX	Domestic Stock	Large Value	%
Goldman Sachs Money Market (Investor class)	FADXX	Money Market		%
Jensen (J shares)	JENSX	Domestic Stock	Large-cap Growth	%
Julius Baer International Equity II	JETAX	Foreign Large Blend	Foreign Stock	%
Loomis Sayles Bond (Retail)	LSBRX	Fixed Income	Multisector Bond	%
Mainstay High Yield Corp A	MHCAX	Fixed Income	High Yield Bond	%
Metropolitan West Low Duration (Class M-Retail)	MWLDX	Fixed Income	Short-term Bond/Stable Value	%
Oppenheimer Developing Mkts (Class A shares)	ODMAX	Foreign Stock	Diversified Emerging Markets	%
Oppenheimer US Govt Trust (Class A shares)	OUSGX	Fixed Income	Intermediate-Term Bond	%
Pax World Balanced	PAXWX	Hybrid	Moderate Allocation	%
PIMCO Commodity Real Return Strategy Fund D	PCRDY	Commodities	Specialty-Natural Resources	%
Rainier Core Equity	RIMEX	Domestic Stock	Large Blend	%
Templeton Global Bond A (Class A)	TPINX	Fixed Income	World Bond	%
Total				100 %

INVESTMENT NOTICE

An investment in a fund is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. It is possible to lose money by investing in the fund.

The information contained herein does not suggest or imply and should not be construed, in any manner, a guarantee of future performance and/or investment advice. Past performance does not guarantee future results. Therefore, you should not assume that the future performance of any specific investment or investment strategy will be profitable or equal to corresponding indicated performance levels. Returns are historical and based on data believed to be accurate and reliable.

The examples provided are illustrations of asset allocation strategies represented by market indices. Historical performance results for investment indices and/or categories do not reflect the deduction of transaction and/or custodial charges or the deduction of an investment management fee, the incurrence of which would have the effect of decreasing historical performance results. Different types of investments involve varying degrees of risk, and there can be no assurance that any specific investment will either be suitable or profitable for your investment portfolio.

As with other investments, mutual funds are subject to market conditions and other associated risks. There is no guarantee that any specific fund or investment strategy will meet its investment objectives. Before investing, consider the investment objectives, risks, charges, and expenses of the fund under consideration. This and other information can be found in the fund's prospectus. Read the prospectus carefully before you invest.

DataPath cannot provide investment advice, opinions, or recommendations regarding investment decisions.

This Investment Program is intended for long-term investments only and not to be used for short-term cash availability. You should maintain a cash balance that will cover your anticipated medical expenses and health plan deductibles.