

HEALTH SAVINGS ACCOUNT Investment Fund Change Form

A. Accountholder Information			
Name*		Social Security #*	
Address*		Email Address	
City, State, Zip*		Employer Name*	
Daytime Phone		Home Phone	

B. Investment Elections – You must indicate the number of shares to be sold/bought from each fund for your request to be processed.

Current Investment Elections (From)		Requested Investment Elections (To)	
Investment Fund ID (ZZZZ) (see Section C for Fund ID)	Number of Shares	**Investment Fund ID (ZZZZ) (see Section C for Fund ID)	Number of Shares
*TOTAL		*TOTAL	

**Totals must match in each section.
 **If transferring funds from your HSA investment account to your HSA debit card account, please use HSA as the Investment Fund ID.*

C. Investment Funds and Investment Fund IDs			
MONEY MARKET & FIXED INCOME		LARGE CAP EQUITY	
Invesco Treasury Portfolio		American Funds of American Mutual R6	RMFGX
Vanguard Total Bond Market Index Admiral Class	VBTLX	Harbor Capital Appreciation Instl	HACAX
Vanguard GNMA Adm	VFIJX	Vanguard 500 Index Admiral	VFIAX
Templeton Global Bond Adv	TGBAX	T. Rowe Price Equity-Income	PRFDX
ASSET ALLOCATION FUNDS		SMALL CAP EQUITY	
Vanguard Target Retirement Income Inv	VTINX	Keeley Small Cap Dividend Value Fund Class A	KSDVX
Vanguard Target Retirement 2015 Inv	VTXVX	Morgan Stanley Inst Small Co Gr I	MSSGX
Vanguard Target Retirement 2025 Inv	VTTVX	American Beacon Stephens Sm Cp Gr INSTL	STSIX
Vanguard Target Retirement 2035 Inv	VTTHX	Vanguard Small Cap Value Index Adm	VSIAX
Vanguard Target Retirement 2045 Inv	VTIVX	INTERNATIONAL EQUITY	
Vanguard Target Retirement 2055 Inv	VFFVX	American Funds Europacific Growth R6	RERGX
American Funds American Balanced R6	RLBGX	Harbor International Institutional	HAINX
MID CAP EQUITY		Artisan International Investor	ARTIX
Vanguard Mid Cap Index Admiral	VIMAX		

I understand that this Investment Fund Change Form must be received by American Fidelity no later than 12:00 p.m. (noon) Central Standard Time for the election to be processed for the current business day. If the form is not received in time, the election I am requesting will be processed the next business day.

I understand that no guarantees can be made as to the investment return of the mutual funds I have selected.

 Signature of Account holder

 Date