Flores
Better Benefits Experience.

Coming Soon: A modern and personalized HSA investment experience

An enhanced experience

We are excited to announce that soon, you will have access to a brand new HSA investment experience – the WealthCare Saver investment solution. Having the ability to personalize your investment journey to fit your unique needs and experience level is important, which is why the WealthCare Saver investment solution allows you to choose from three different investment models – Managed, Self-Directed and a first-of-its-kind Brokerage option – all of which are designed to help you work toward your long-term investing goals. Best of all, it's fully integrated with the Flores & Associates HSA solution, which means you will be able to manage all aspects of your HSA, including your investments, from the same portal.

Investment models to fit your needs

Managed: Designed for novice investors who prefer to have our advisor tool automatically select and rebalance investments on an ongoing basis in accordance with their age and/or risk profile. This account type delivers a "do-it-for-me" approach to investing.

Self-Directed: Designed for intermediate investors who have the desire to self-select from a menu of monitored investment options covering multiple asset classes to diversify their portfolio, and then rebalance their portfolio manually. This account type provides a balance between do-it-for-me and DIY approaches to investing.

Brokerage: Designed for adept investors who desire to perform advanced research and trading across hundreds of individual stocks and exchange-traded funds (ETFs). This account type offers a hands-on, DIY approach to investing.

Your new investment experience at a glance

- **Real-time account opening and trading:** Easily track where your hard-earned money is and how it's performing – in real time.
- **Modern investment options:** Whether you're new to investing and seeking a guided experience or a seasoned investor looking to research and trade stocks and ETFs available on the platform, you can select an investment journey that is aligned with your needs.
- **Easy access:** Manage all aspects of your HSA, including your spending account and your investments, from a single location.
- **Tools and resources:** Access a full suite of educational materials to help put you on the path to success.

www.flores247.com

P.O. Box 31397 • Charlotte, North Carolina 28231 • 800.532.3327

Flores
Better Benefits Experience.