

Investment Name	Ticket	Asset Category
Fidelity Government Money Market Fund	SPAXX	Money Market – Taxable
Lord Abbett Short Duration Income R6	LDLVX	Short-Term Bond
Vanguard Total Bond Market Index Adm	VBTLX	Intermediate Core Bond
Victory Pioneer Bond Fund CLASS R6	PBFBX	Intermediate Core Plus Bond
PIMCO Income Instl	PIMIX	Multisector Bond
MFS Value R6	MEIKX	Large Value
Columbia Contrarian Core Inst3	COFYX	Large Blend
Vanguard 500 Index Adm	VFIAX	Large Blend
Nuveen Large-Cap Growth Instl	TILGX	Large Growth
Victory Sycamore Established Value R6	VEVRX	Mid-Cap Value
Vanguard Mid-Cap Index Adm	VIMAX	Mid-Cap Blend
JPMorgan Mid-Cap Growth R6	JMGMX	Mid-Cap Growth
Undiscovered Managers Behavioral Value R6	UBVFX	Small Value
Vanguard Small-Cap Index Adm	VSMAX	Small Blend
Fuller & Thaler Behavioral Small Cap R6	FTHFX	Small Blend
Hood River Small-Cap Growth Retirement	HRSIX	Small Growth
Vanguard International Value Inv	VTRIX	Foreign Large Value
Vanguard Toal Intl Stock Index Adm	VTIAX	Foreign Large Blend
Vanguard Internaional Growth Adm	VWILX	Foreign Large Growth
Vanguard Tax-Managed Balanced Adm	VTMFX	Moderately Conservative Allocation
American Funds American Balanced R6	RLBGX	Moderate Allocation
Health Savings Brokerage Account		

These funds were not selected for or tailored to any investor’s individual circumstances. We do not make recommendations regarding investing or holding any of these funds. Investors should read the prospectus carefully and consider a fund’s investment objectives, risks, charges, and expenses before investing. Investing in certain funds involves special risks, such as those related to investments in foreign securities, small- and mid-capitalization stocks, and high-yield securities.

- Excess balance can be invested in mutual funds.
- A link to set up investment sweeps is available via the consumer portal.
- Automatic sweep investment elections are made with a \$100 minimum transfer.
- All funds may be purchased at net asset value without a front-end load. Redemption fees may apply.
- Prospectus information is available and mutual fund elections are made via <https://mcgriffinsurance.lh1ondemand.com>.

For more information, visit McGriff.com.

Your Health Savings Account (HSA) funds may be held by Marsh & McLennan Agency LLC in a custodial deposit account at Truist Bank. While so deposited, the funds are FDIC-insured to the extent provided by law. Investment solutions are provided by Marsh & McLennan Agency LLC. Advisory services are provided by Precept Advisory Group, LLC a subsidiary of Marsh & McLennan Agency LLC.

Please refer to the prospectus applicable to each mutual fund. Securities, insurance and advisory products or services are: NOT A DEPOSIT • NOT FDIC-INSURED • NOT GUARANTEED BY A BANK • NOT INSURED BY STATE OR FEDERAL GOVERNMENT AGENCY • MAY GO DOWN IN VALUE. Marsh & McLennan Agency LLC does not provide brokerage services; brokerage services are provided by Charles Schwab. Marsh & McLennan Agency LLC and Charles Schwab are separate and unaffiliated firms and are not responsible for each other’s services or policies. Self-directed investment accounts are the sole responsibility of the account owner. Carefully weigh the advantages and disadvantages of investing your funds before doing so. Your ability to replace losses in the investment account may be limited by the annual contribution limits of your HSA. Marsh & McLennan Agency LLC does not offer investment advice. Performance data and ratings represent past performance and are not a guarantee of future results. Investment returns and principal value will fluctuate and investors’ shares, when sold, may be worth more or less than their original cost.