

Consumer-Direct

HSA Pricing



Individual HSA: \$2.25 per month | www.wexbenefitsyou.com/schwabhsa

\$3,000 total balance waiver

PPPM fee waived once the participant's cash and investment balance is over \$3,000.

HSA fee schedule

The only additional fee that may apply is the HSA custodial management fee. This fee is charged on any mutual fund investments available within your HSA investment account. This fee does not apply to mutual funds you hold within your HSBA. This fee is deducted on a quarterly basis, directly from your mutual fund balances. Some mutual funds may pay 12b-1 and/or STA fees. These fees will be allocated back to your HSA investment account upon receipt from the mutual fund company.

\$1,000 investment threshold

Access to Schwab's Health Savings Brokerage Account (HSBA) after cash balance gets to \$1,000.

HSBA fee schedule

There are no maintenance fees or account minimum balance requirements within the Schwab HSBA. The only fees associated with the Schwab HSBA pertain to trading commissions. Please see the Charles Schwab Pricing Guide for Retirement Plan and Health Savings Account for more complete pricing information. This is available at schwab.com/cbrspricingguide.*

Appointing your investment adviser

Investors can appoint an Investment Adviser to manage their HSBA investments by completing a Schwab Limited Power of Attorney Form (LPOA).

The Schwab Health Savings Brokerage Account is offered through Charles Schwab & Co., Inc. (Member SIPC), the registered broker-dealer, which also provides other brokerage and custody services to its customers. *The standard electronic \$0 commission does not apply to large block transactions requiring special handling, restricted stock transactions, trades placed directly on a foreign exchange, transaction-fee mutual funds, futures, or fixed income investments. Options trades will be subject to the standard \$0.65 per-contract fee. Service charges apply for trades placed through a broker (\$25). Exchange process, ADR, foreign transaction fees for trades placed on the U.S. OTC market, and Stock Borrow fees still apply. See the Charles Schwab Pricing Guide for Retirement Plan and Health Saving Accounts for full fee and commission schedules at schwab.com/cbrspricingguide.



Own your tomorrow.

