

Associated Bank HSA Fund Change History

Updated: October 2, 2025

Date	Fund	Ticker	Change
10/2/2025	MFS Mid Cap Growth R6 Retirement	OTCKX	Replaces Baird Mid Cap Growth Institutional Ticker: BMDIX
10/2/2025	Vanguard Total Bond Market Index Adm Institutional Class	VBPIX	Replaces Vanguard Total Bond Market Index Admiral Share Class Ticker: VBTLX
10/2/2025	Vanguard Total Intl Stock Index Institutional Class	VTSNX	Replaces Vanguard Total Intl Stock Index Admiral Share Class Ticker: VTIAIX
10/2/2025	Harbor Small Cap Growth Retirement	HNSGX	Replaces Wasatch Small Cap Growth Institutional Share Class Ticker: WIAEX
12/5/2024	Schwab Government Money Ultra Share Class	SGUXX	Replaces Schwab Government Money Market Investor Share Class Ticker: SNVXX
9/1/2023	Schwab Government Money Market Investor Share Class	SNVXX	Added
4/5/2022	Vanguard Extended Market Index Fund Institutional Shares	VIEIX	Replaces Vanguard Extended Market Index Fund Admiral Shares Ticker: VEXAX
3/15/2021	Vanguard International Value Inv	VTRIX	Replaces: Templeton Instl Intl Eq Ser Primary Ticker: TFEQX
11/20/2019	Vanguard Institutional Index	VINIX	Share Class Conversion Vanguard 500 Index Admiral Shares Ticker: VFIAX
3/21/2019	Vanguard Morgan Growth	VMRAX	Deleted
2/19/2019	Vanguard US Growth	VWUAX	Added
1/17/2019	Harbor International	HNINX	Deleted
12/14/2018	American Funds EuroPacific	RERGX	Added

3/5/2018	American Funds Capital World Bond R6	RCWGX	Replaces: American Funds Capital World Bond F2 Ticker: BFWFX
3/5/2018	MFS Mid Cap Value R6	MVCKX	Replaces: MFS Mid Cap Value I Ticker: MCVIX
3/5/2018	American Funds New World R6	RNWGX	Replaces: American Funds New World F3 Ticker: FNWFX
3/5/2018	American Funds New Perspective R6	RNPGX	Replaces: American Funds New Perspective F3 Ticker: FNPFX

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Investment, Securities and Insurance Products

NOT FDIC INSURED	NOT BANK GUARANTEED	MAY LOSE VALUE	NOT INSURED BY ANY FEDERAL GOVERNMENT AGENCY	NOT A DEPOSIT
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