Wespath

1901 Chestnut Avenue
Glenview, Illinois 60025-1604
wespath.org

HealthFlex Incentive HRA/HSA Contributions—Exhibit F

Plan Sponsor name _____

HealthFlex number _____ UMC ID # _____

All HealthFlex Plan Sponsors have the ability to offer incentives to their participants. All incentives are optional and are provided at the discretion of the plan sponsor. All incentives must be achieved/earned/owed before they can be posted. Wespath has the ability to post these incentives to a HRA or HSA or to have the incentives paid in Rewards Cash®[1] through the Personify Health platform. If you would like incentives paid in Rewards Cash, please complete *Well-Being Programs Eligibility and Additional Incentives—Exhibit E*.

Part 1 – Incentives for Situations not Captured by the Premium Credit

❑ Clergy Couples Amount: $_____ Posting Frequency: ❑ Monthly ❑ Quarterly ❑ Annually

❑ Other _____ Amount: $ _____ Posting Frequency: ❑ Monthly ❑ Quarterly ❑ Annually

Part 2 – Incentives for Blueprint For Wellness® (BFW) and/or HealthQuotient (HQ) Completion

❑ BFW Amount: $_____ Posting Frequency: Annually

❑ HQ Amount: $_____ Posting Frequency: Annually

Wespath will fund these incentives in the form of a HSA contribution for anyone who is enrolled in a HSA plan and has accepted the terms and conditions. Adjustments to (personal) contributions may need to be made to avoid exceeding the annual IRS limit. For individuals enrolled in a HRA plan or B1000 plan, Wespath will fund these incentives in the form of a HRA contribution. HRA termination policy will apply.

Plan Sponsor is responsible for ensuring that any applicable nondiscrimination requirements are statisfied with respect to its employees. Plan Sponsor agrees to provide Wespath with necessary records and data in a form acceptable to Wespath. Plan Sponsor will determine the individuals who will receive the incentive and the amount of the incentive. Additionally, Plan Sponsor agrees to provide the information in the format specified by Wespath.

Wespath will invoice Plan Sponsor quarterly for all incentives posted in the prior quarter. Plan Sponsor agress to remit payment of invoiced fees to Wespath within 30 days of the date of the invoice. Wespath may terminate this Exhibit immediately if a Plan Sponsor fails to pay any applicable incentives upon the due date pursuant to the terms of this Exhibit. In the event Wespath seeks to terminate the Plan Sponsor's Exhibit due to unpaid invoices, Wespath shall provide to Plan Sponsor written notice of its intent to terminate. Wespath shall provide such written notice to Plan Sponsor no less than five business days prior to the effective date of termination.

[1] Incentives are considered taxable income. Please consult with your tax advisor.

Part 3 – Signature

(Print Plan sponsor name)_____
has identified the incentives to be paid as indicated above in this *Exhibit F to the HealthFlex Plan Sponsor Adoption Agreement*, dated _____ to become effective on _____ and to remain in effect until further notice.

Print name of authorized representative _____

Title _____ Date_____

❑ I understand that checking this box and typing my name on the email that accompanies this document (sent from the work address of this authorized individual) constitutes a legally binding signature accepted by Wespath:

Print name of authorized representative _____ Title_____

Plan manager signature _____ Date_____