Change Investments - HSA

Once you have funds allocated to the investments within your HSA you will be able to change your investments and allocation percentages.

1. Log In to your online account. If you cannot remember your log in or need help with the log in process, go HERE.

2. From the Accounts menu select Investment Summary. Select Change Investments

Home	Accounts	Tools & Support	Message Center 4
Investments / HSA	Summary		
Total Available Balance \$26,207.65	YTD Earnings \$87.34	YTD Performance 13.44% ▲ View details	
Investment Balance \$1,097.88 *Current as of 11/12		View details	Cash Balance View details \$4,100.00 Investment Auto-Transfer ON Edit Threshold: \$4,000.00
1.25K 1K 750 500 250 Nov Dec Jan Feb Mar Change Investments View	Apr May Jun Jul w all available funds	@dailyVest I Aug Sep Oct	 →I Contribute Add cash to your HSA (← Distribute Withdraw HSA funds

3. What do you want to change? You can choose to change All Investments, Current Portfolio, or only Future Investments. Select what to change by clicking on option, click Next.



Home		Accounts	Tools & Support	Message Center 4
Investmer	nts / Cha	nge Investmen	ts	
Which invest	tments do yo	u want to change?		
		All Investments (most p Includes money currently i contributions.		deposits and
	CP	Current Portfolio Only the money that is cur	rently invested.	
		Future Investments Only where future deposite	s and contributions will be	invested.
Cancel				Next

4. You may select your own Investments and allocation % or you can choose a guided selection. Select which method you prefer by clicking on the box and then click Next

Do you want g	uided help	investing?	
	Ø	Guide Me We will ask you a few questions to help you make an informed decision for your investments.	
	Ĵ,	I Want to Do It Myself Continue setting up investment selections without guided help.	

You will be walked through the pre-selected funds if you selected Guide Me. I Want to Do It Myself will bring you to select the funds and allocation % for your investments (Be sure total allocation equals 100%). Click Submit to complete your Setup.

