

# Setup Your HSA Investments

You will need to maintain a minimum cash investment. Once your balance is above the required minimum you may elect to move some of your funds into the investment options available within your plan. In order to set up your funds in excess of the minimum cash threshold (or more if you prefer) to move into the investment options you've set up, you must first define an investment sweep amount.

1. To set the investment sweep amount, choose **Accounts** and select **Investment Summary**

Select **Start Investing** or **Set target Cash balance**.

### HSA Balance Projection

Annual Savings  
**\$3,600/year**

Number of years  
25

Return on Investment (%)  
5

Cash only      With investments

[Start Investing](#)      [View all available funds](#)

### Cash Balance

**\$711.32**      [View details](#)

Investment Auto-Transfer      OFF  
Threshold: \$0.00

→ Contribute  
Add cash to your HSA

← Distribute  
Withdraw HSA funds

### How do I start investing?

[Start investing now](#)

#### 1 Set target cash balance

Your target cash balance determines when your HSA dollars begin investing.

#### 2 Select investment funds

Choose investments so your dollars grow over time.

#### 3 Grow your money with contributions

Cash balances over a certain threshold will automatically be invested for you.

Be sure to turn auto-investment transfers on, and select the cash threshold amount.

## Investments / Setup

### Investment Transfer Threshold (Step 1 of 3)

You are eligible to invest a portion of the funds from your health saving account into an investment account. By setting your investment transfer threshold below, we will automatically transfer funds into the investment account once your available cash balance exceeds the transfer threshold amount by \$100.01 or more. Likewise when your available cash account balance falls below the transfer threshold by \$100.01 or more, funds will be automatically transferred back to your cash account from your investment account.

Your investment transfer threshold may be set equal to or above \$2000. Please enter a value that is an increment of 100.

Would you like auto-investment transfers on?

☒ Yes ☐ No

Transfer Funds to Investment When My Cash Balance Exceeds:

\$ 2000

Investment Services: Not FDIC Insured • No Bank Guarantee • May Lose Value

Cancel

Save and Next

Hit **Save and Next** and after that point any contributions in excess of your threshold will sweep into your pre-selected investment options.

2. Once the investment sweep amount is set and saved, you will be prompted to Setup Investments. 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 guided help investing?



##### Guide Me

We will ask you a few questions to help you make an informed decision for your investments.



##### I Want to Do It Myself

Continue setting up investment selections without guided help.



3. 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.

## Investments / Change Investments

### Change Future Elections

Changes you make on this page will update your future elections only. When new money moves into your investment account, your new selections will control how it is invested.

FUND NAME	TICKER	BALANCE	CURRENT %	NEW %
+ MY GROWTH IPM	IPM-001	\$0.00	10 %	<input type="text"/> %
+ OPPENHEIMER DEVELOPING MKT Y	ODVYX	\$0.00	20 %	<input type="text"/> %
+ PIMCO LOW DURATION INTSL	PTLDX	\$0.00	20 %	<input type="text"/> %
+ OPP MAIN SM CAP	OPMSX	\$0.00	20 %	<input type="text"/> %
+ PIMCO COMMODITY REAL RETURN	PCRIX	\$0.00	20 %	<input type="text"/> %
+ THORNBURG INTL VALUE	TGVAX	\$0.00	10 %	<input type="text"/> %
+ BLACKROCK EQUITY DIVIDEND CL I	MADVX	\$0.00	0 %	<input type="text"/> %
<b>Total</b>		\$0.00	100 %	0 %