

# 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

<b>Total Available Balance</b> \$26,207.65	<b>YTD Earnings</b> \$87.34	<b>YTD Performance</b> 13.44% ▲ <small>View details</small>
---	--------------------------------	---

### Investment Balance

\$1,097.88 \*Current as of 11/12/2018

**Current** Projected View details

Month	Balance
Nov	250
Dec	400
Jan	450
Feb	450
Mar	550
Apr	550
May	700
Jun	750
Jul	750
Aug	750
Sep	750
Oct	1100

[Change Investments](#) [View all available funds](#)

### Cash Balance

\$4,100.00 View details

Investment Auto-Transfer  ON [Edit](#)  
Threshold: \$4,000.00

[→ 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

## Investments / Change Investments

Which investments do you want to change?


 **All Investments** *(most popular)*  
Includes money currently invested, as well as future deposits and contributions.


 **Current Portfolio**  
Only the money that is currently invested.

 **Future Investments**  
Only where future deposits and contributions will be invested.

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 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.

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.