## KNOWLEDGEBASE



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ARTICLE PROD-2270

## How to set up your health savings account (HSA) investments and transfer money to your investment account

Participant

Client

PS Agent

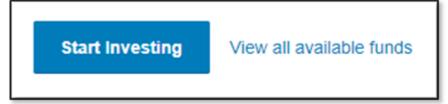
Client Agent

This article outlines how to set up your health savings account (HSA) investments and transfer money from your cash account to your investment account.

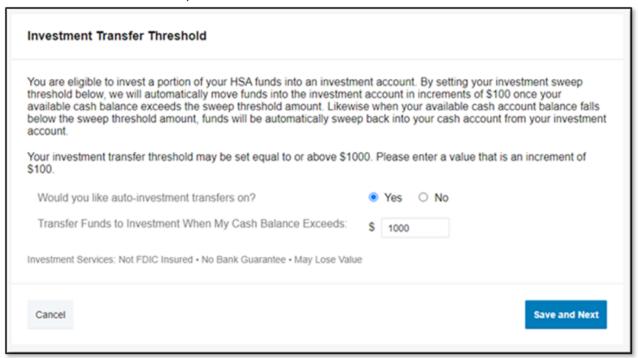
Note: To watch a video tutorial, click here.

To set up your investments and transfer money to your investment account, complete the following steps in your online account:

- 1. Navigate to the Accounts tab.
- 2. Under Investments, click "Investment Summary."
- 3. Click "Start Investing" in the middle of the page.

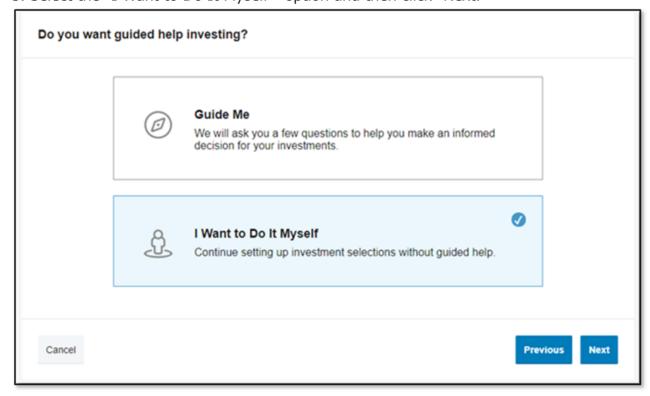


4. Select that you'd like to enroll in auto-investment transfers, provide your desired transfer threshold amount, and then click "Save and Next."



Note: When you enroll in auto-investment transfers, funds are automatically moved from your cash account to your investment account once your balance exceeds the threshold amount. If you have any pending contributions or pending distributions, including transactions made with your WEX benefits card, a transfer won't occur until those transactions have settled.

5. Select the "I Want to Do It Myself" option and then click "Next."



6. Make any needed adjustments to your investment allocation in the HCB Interest Bearing Account to determine where funds above your investment threshold will automatically be transferred once available.



Note: The allocation defaults to 100% in the HCB Interest Bearing Account.

7. Click "Submit."

<u>Note</u>: If your cash account balance exceeds the threshold you established, funds will automatically be transferred to your investment account within three business days.

**Learn more about investing through an HSBA:** Enroll in your HSBA | Transfer your HSA investment funds to an HSBA | Access your HSBA to manage investments

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