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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.

Start Investing[View all available funds](#)

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

Investment Transfer Threshold

You are eligible to invest a portion of your HSA funds into an investment account. By setting your investment sweep threshold below, we will automatically move funds into the investment account in increments of \$100 once your available cash balance exceeds the sweep threshold amount. Likewise when your available cash account balance falls below the sweep threshold amount, funds will be automatically sweep back into your cash account from your investment account.

Your investment transfer threshold may be set equal to or above \$1000. 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: \$


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


[Cancel](#) [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."

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.

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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.

Update/Confirm 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. Your elections must equal 100%. You can find out more information about a fund using the fact sheet or prospectus.

FUND NAME	TICKER	CURRENT %	NEW %
+ HCB INTEREST BEARING ACCOUNT	HCB1B	100 %	<input type="text" value="100 %"/>

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

7. Click "Submit."

Note: 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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