

# KNOWLEDGEBASE

All Topics ▾

Keywords



Home > Benefits > Health savings account (HSA) > [How to use the health savings account \(HSA\) investment guidance tool](#)

ARTICLE PROD-2271

## How to use the health savings account (HSA) investment guidance tool

Participant

Client

PS Agent

DBI Internal Client Agents

This article outlines how to use the health savings account (HSA) investment guidance tool. The HSA investment guidance tool lets you take financial planning into your own hands and make wise investments with your HSA funds.

You can complete the following tasks in the investment guidance tool:

- Track your healthcare expenses
- Obtain a personalized risk assessment
- Determine your healthcare expense needs after retirement and create strategies for meeting them
- Access probability simulations to estimate a healthcare balance at retirement
- Learn more about your investment options
- View recommendations for specific asset class allocations
- Get help with meeting your investment goals

To access the investment guidance tool, complete the following steps:

1. Navigate to the Accounts tab.
2. Under the Investments section, click "Education."
3. Click "Guidance Tool."

Note: A new browser window will open.

4. Click "Strategy Builder" and provide the information required to complete your comprehensive HSA investment plan.

5. Review your customized action plan.



Was this article useful?

Yes

No

[Bookmark](#) [Print](#)

## Related Articles

[Health savings account \(HSA\) investment contact information](#)

[Health Savings Account \(HSA\) and age 65](#)

[How to upload documents to validate a blocked Health Savings Account \(HSA\) in your online account](#)

[How to manage your health savings account \(HSA\) investments in your online account](#)

## Health Savings Account (HSA) Mistaken Contributions Form

Powered by eGain