## KNOWLEDGEBASE

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ARTICLE PROD-2271

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

Participant

Client

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:

PS Agent

- 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:

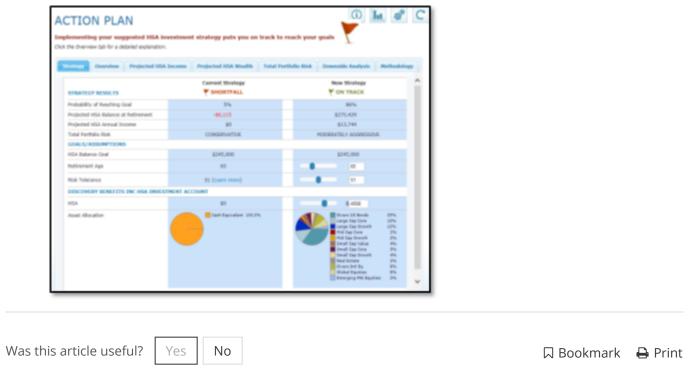
- 1. Navigate to the Accounts tab.
- 2. Under the Investments section, click "Education."
- 3. Click "Guidance Tool."

Note: A new browser window will open.

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

HSA Investment Account						
	HOME STRATEGY BUILDES	EDUCATION	GLOSSARY			
STRATEGY BUILDER Personal Information Current Accounts Current Medical Expenses = Goals & Assumptions # Action Plan	PERSONAL INFORMATION Building a comprehensive HEA investment plan begins with an understanding of your current financial structure and goals. Take a moment to FE in your information below.					
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5. Review your customized action plan.



## **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

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