

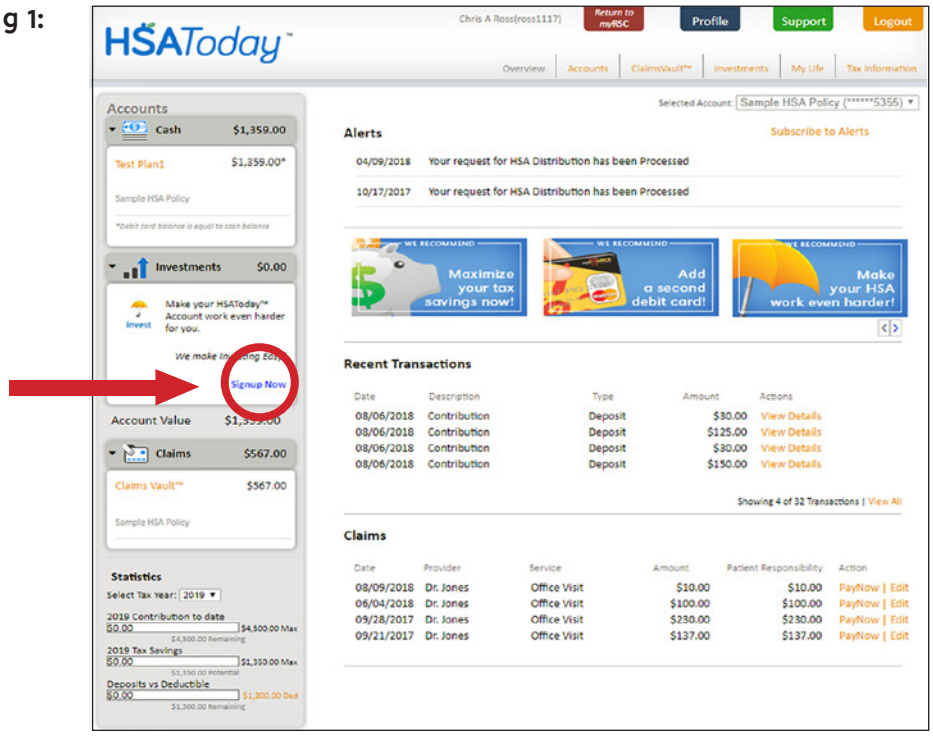
HSAToday® Investing How-To Guide

Your Health Savings Account (HSA) is a valuable healthcare benefit with which you can invest your balance tax-free and grow your account. Once you reach the $1,000 threshold, you may begin investing. The following steps will guide you through the HSAToday® investing process.

Step 1: Log in to your account. The dashboard displays.

Step 2: Click **Signup Now** under Investments (left column). **(Fig. 1)**

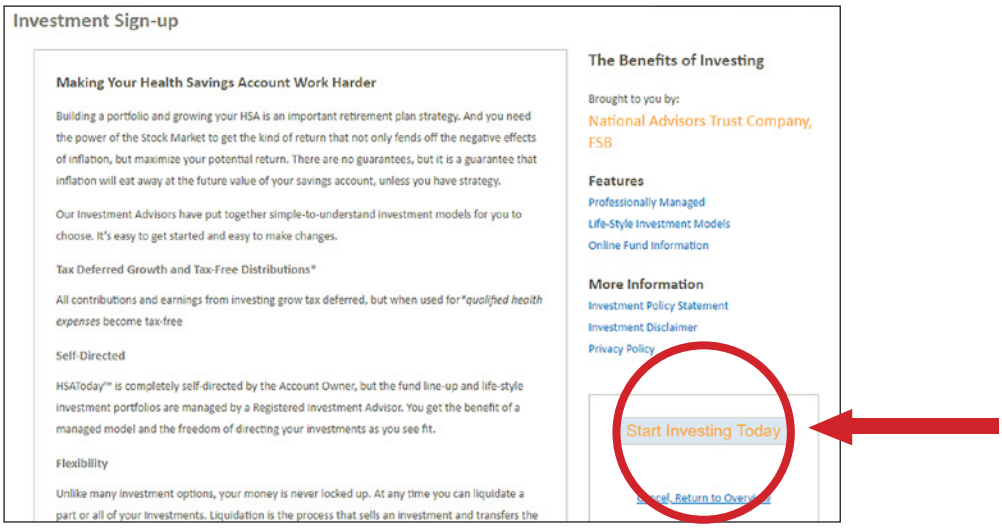
Fig 1:



The Investment Sign-up page displays.

Step 3: Click **Start Investing Today** (right column) (Fig. 2)

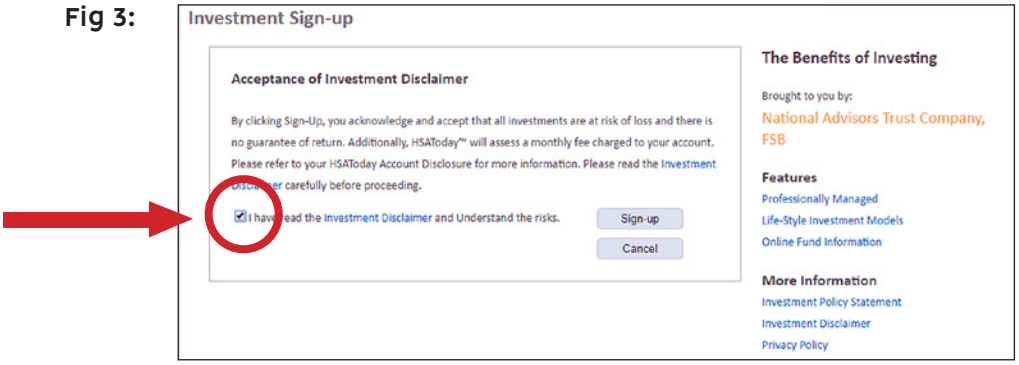
Fig 2:



An investment disclaimer displays.

Step 4: **Click the check box** to accept the disclaimer and **click Sign–up.** (Fig. 3)

Fig 3:



The Changing Your Investment Direction page displays. Here you will choose how much (in percentage) of new deposits you would like to invest.

Setting Percentage of Contributions To Invest

Step 5: **Move the slider** to make your selection and **click Continue. (Fig. 4)**

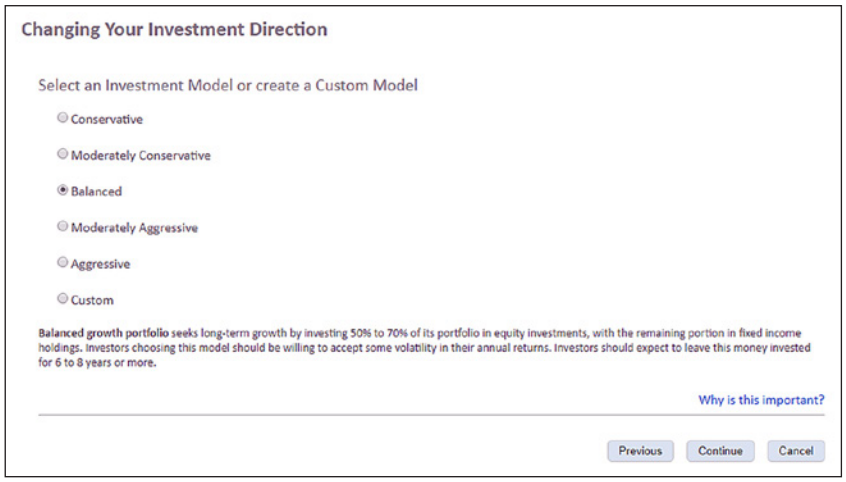
Fig 4:



Step 5.1. *Next you will have to choose an investment model.*

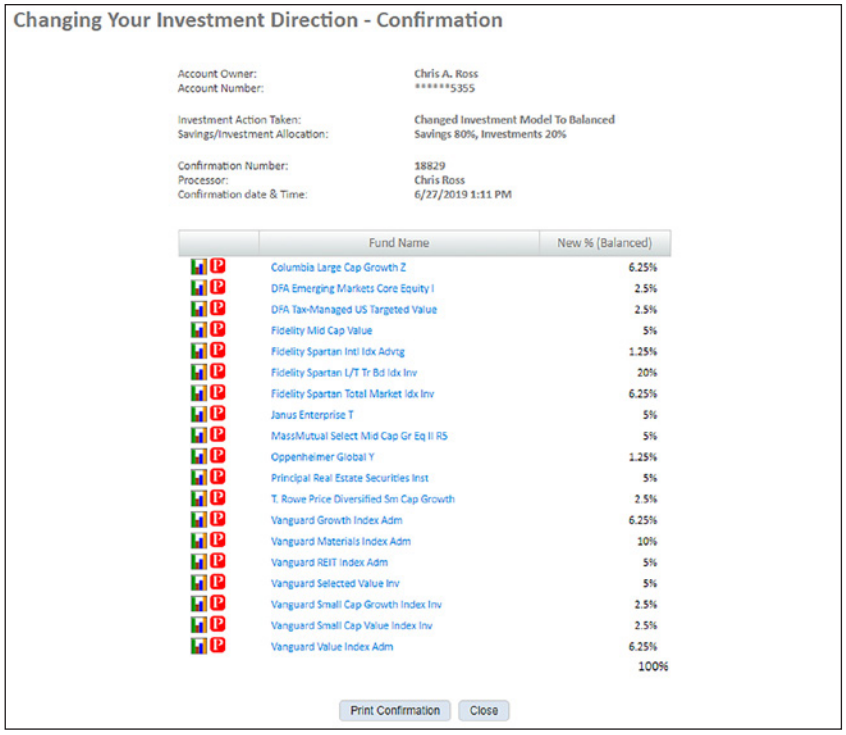
Step 5.2. *From this screen* **(Fig. 5)**, *you may choose a pre-determined model or Custom. Visit* ***hsatoday.com*** *to review investment model descriptions*

Fig 5:



Step 6: **Choose a pre-configured *Investment model or select Custom.***
***After you click* Continue,** *a Confirmation screen displays the funds and percentages of your chosen investment model* **(Fig. 6).** *You may print your confirmation*

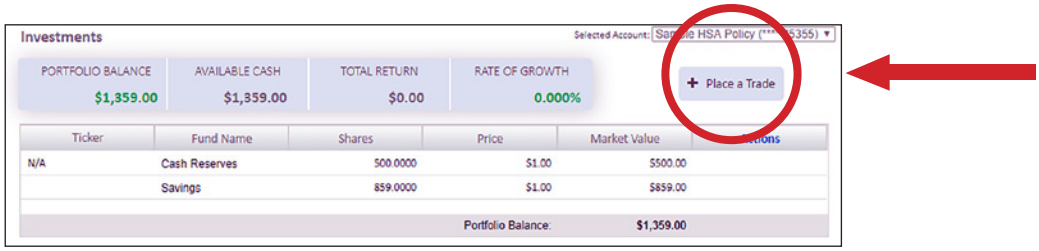
Fig 6:



Investing from Your Fund Balance

Step 7: **Review the investments table** to confirm your **current cash balance. (Fig. 7)**
Select **Place a Trade.**

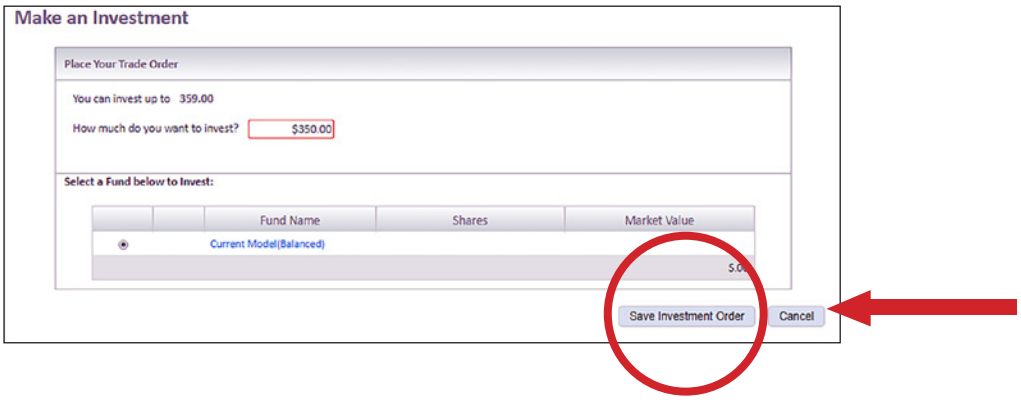
Fig 7:



The Make an Investment page displays.

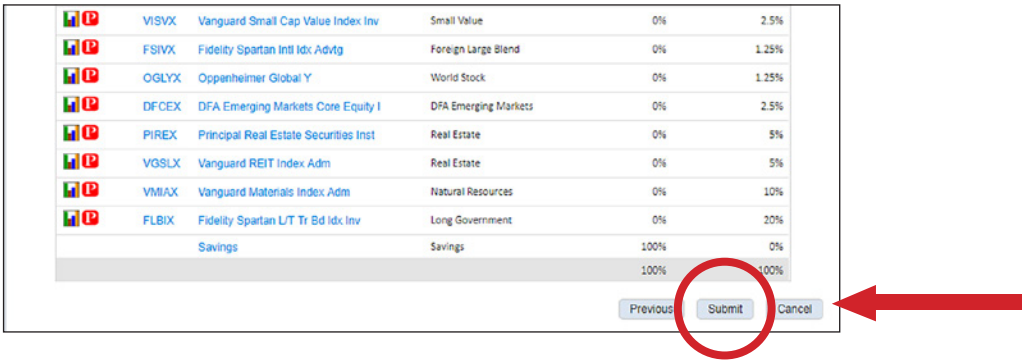
Step 8: The **Make an Investment** page confirms how much you can invest at that point in time. **Enter the amount you want to invest** in the text box and **click Save Investment Order. (Fig. 8)**

Fig 8:



Step 9: The **Confirmation Page** reflects the funds you are purchasing and that the investment is funded from the account savings balance. **(Fig. 9)**

Fig 9:



Click Submit and your purchase is complete.

MCGREGOR
EMPLOYEE BENEFITS ADMINISTRATORS & CONSULTANTS

997 Governors Lane, Suite 175 Lexington, KY 40513
Toll Free (866) 233-4377 Direct Dial (859) 618-6275 Fax (859) 255-2999
www.mcgregoreba.com

Copyright © 2020 DataPath, Inc. All rights reserved.