Health Savings Account Investments
WealthCare Saver as Custodian

Portal Quick Reference Guide

Your guide to unlocking the unlimited potential of your HSA

Personal Performance Home Page

- View account summary & balance information
- View allocation by mutual fund
- Filter historical return data by mutual fund and/or time period

Account Summary

- **Account Profile** – General account information including the name and email address associated with the account.
- **Investment Summary** – View of balances, allocation percentages and future investment election percentages for new money deposited into the investment account by mutual fund. The icons provide access to each mutual fund's prospectus and Morningstar® fact sheet.
- **My Performance** – View an investment account summary including the balance, rates of return, and allocation by mutual fund. Can be filtered by mutual fund and/or time period.

Planning Tools

- **HSA Guided Portfolio** – Implement a personalized asset allocation with automatic rebalancing.
- **Fund Performance Dashboard** – View the Fund Performance Dashboard, which provides historical mutual fund return and fee information for the investment options available through the investment account. Links are also provided to mutual fund resources like the prospectus, fact sheet, and Morningstar® page.
- **HSA Balance Projection Tool** – A tool that projects the value of the investment account over time based on the current balance, annual contribution amount, annual rate of return, and years of investment entered by the user.
- **Market Cycles** – Provides historical data on the best to worst performing asset classes by year.

Statements and Activity

- **Quarterly Statements** – View or print an electronic investment statement.
- **Statement on Demand** – This feature allows a user to view and print a customized statement of their HSA Investment account activity. View and print up to inception months of account history.
- **Pending Activity** – View pending buy or sell orders initiated through the investment account portal.
- **Transaction History** – View investment account transaction history by date range.

Help

- **Frequently Asked Questions** – Find answers to some of the most frequently asked questions about the HSA investment account.
- **User Guide** – A quick overview of the investment portal and various functionality found within it.
- **Portal Video Tutorials** – Learn how to navigate the investment portal.
- **Investment Concepts** – An educational resource that may be used to help learn key investment concepts.