



HSA Investments CONSUMER PORTAL QUICKSTART GUIDE

Welcome to your Driven125 Benefit Accounts Consumer Portal. This one-stop portal gives 24/7 access to view information and manage your Health Savings Account Investments.



HSA Investing

Go to the Consumer Portal today! Login.driven125.com

1. Register Online: You will be prompted to update your password, complete security questions & sign your Terms & Conditions
2. Set up Investment Sweeps: You will be surprised at how quickly your account will grow! Be ready to maximize your account by setting up your account to sweep to investments automatically at \$2,000 or higher. See “How do I sign up to Access/Sweep cash to Investments?”

Our one-stop investment portal provides you with:

- Anytime, anyplace access to your HSA investments, including online portfolio changes and 24/7/365 availability
- Integrated access to your investments, meaning you only need to remember one username and password
- Fund performance and prospectus information for several available mutual funds
- View your investment account activity details
- No trade fees

This portal is designed to be easy to use and convenient. You have your choice of two ways to access your investments:



Click on **Manage Investments** from the “I Want to...” section



Click on the **Accounts** tab at top of Home Page and select a menu item from the Investment section



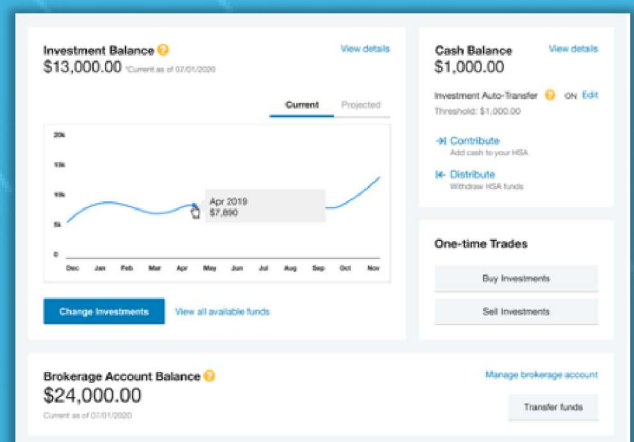
HOW DO I SIGN UP TO ACCESS/SWEEP CASH TO INVESTMENTS?

1. From the home page, access the Investments Summary page by clicking on the Manage Investments, button from the “I want to section” or click on **Manage Investments** from the Accounts menu.
2. Once you get to the summary page, select the Start Investing button on the left-hand side of the screen.
3. Choose either Automatic Investing to Auto-Transfers to or from an Investment Account.
4. Set auto-investment transfers to yes, and enter the dollar amount (above the noted minimum) to set as a ‘cash threshold balance’ for your investments to automatically transfer between cash and investments ongoing. You can change this at any time!
5. Don’t forget to set your investment allocation! See “How do I change my Investment Elections?” below.

HOW DO I MANUALLY TRANSFER FUNDS?

From the Investment Summary page you can initiate One-Time Transfer either to or from your HSA Cash to your investment account. Click on the Buy Investments or Sell Investments button next to the appropriate choice:

- Transferring based on your investment election will transfer to or from your HSA Cash to your mutual funds based on your existing fund allocation.
- Transferring based on a specific investment will transfer to or from your HSA cash to one or more specific mutual fund options.

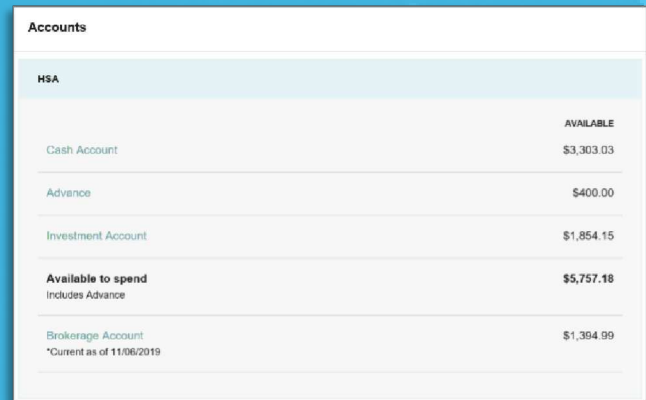


HOW DO I FIND MY INVESTMENT BALANCE?

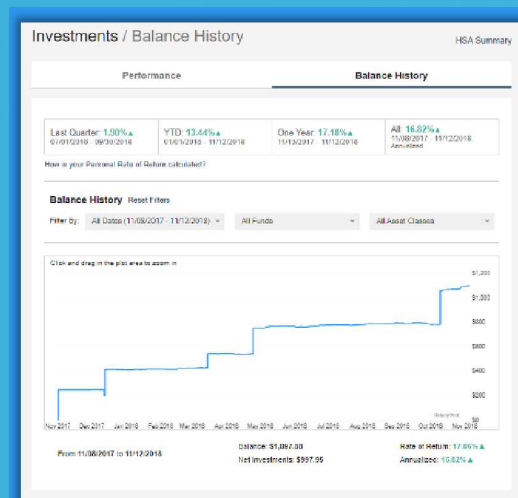
You can find your HSA cash, and investment balances directly from the home page under the Accounts section. For more details click on the appropriate balance name and select Account Activity. From there, you can view even more detail regarding your account.

WHERE DO I FIND MY INVESTMENT DETAIL?

From the Homepage, click on the Manage Investments button under the “I want to section”. The Investment Summary page provides you with a dynamic snap shot view of your investment account. The menu on the left-hand side allows you to drill down into specific details regarding your investment account and allows you to manage your investment portfolio.



Accounts	
HSA	
	AVAILABLE
Cash Account	\$3,303.03
Advance	\$400.00
Investment Account	\$1,854.15
Available to spend Includes Advance	\$5,757.18
Brokerage Account *Current as of 11/06/2019	\$1,394.99

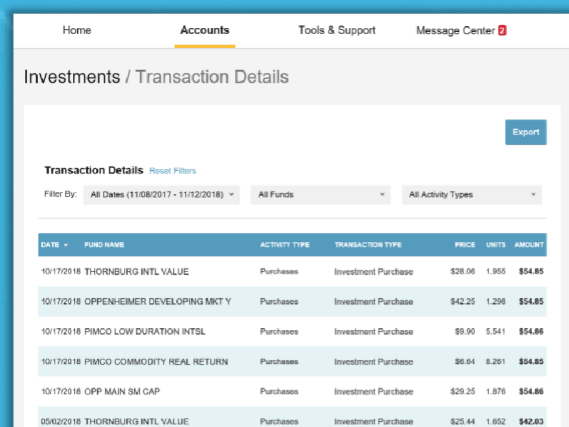


WHERE DO I FIND MY INDIVIDUAL INVESTMENT BALANCES?

From the Accounts tab, click on the Balance History in the Investments section. Use the filters to provide you with specific balance information related to your investments.

HOW CAN I FIND MY INVESTMENT TRANSACTION DETAIL?

From the Accounts tab, click on Investment Activity in the Investments section, and select Transaction Details.



Home Accounts Tools & Support Message Center 2

Investments / Transaction Details

Export

Transaction Details Reset Filters

Filter By: All Dates (11/08/2017 - 11/12/2018) All Funds All Activity Types

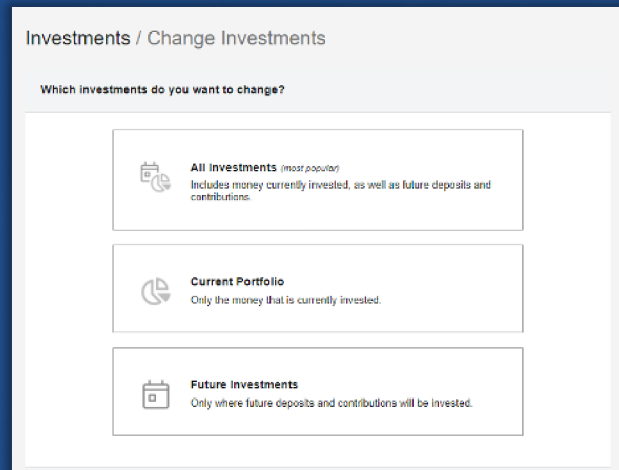
DATE	FUND NAME	ACTIVITY TYPE	TRANSACTION TYPE	PRICE	UNITS	AMOUNT
10/17/2018	THORNBURG INTL VALUE	Purchases	Investment Purchase	\$28.06	1.955	\$54.85
10/17/2018	OPPENHEIMER DEVELOPING MKT Y	Purchases	Investment Purchase	\$42.25	1.298	\$54.85
10/17/2018	PIMCO LOW DURATION INTSL	Purchases	Investment Purchase	\$9.90	5.541	\$54.86
10/17/2018	PIMCO COMMODITY REAL RETURN	Purchases	Investment Purchase	\$6.64	8.261	\$54.85
10/17/2018	OPP MAIN SM CAP	Purchases	Investment Purchase	\$29.25	1.876	\$54.86
05/02/2018	THORNBURG INTL VALUE	Purchases	Investment Purchase	\$25.44	1.652	\$42.03



HOW DO I CHANGE MY INVESTMENT ELECTIONS?

To setup or change your investment elections for future contributions to your investment account, click on Investment Summary from the Accounts tab.

Click on the Change Investments button on the Investment Balance card. You can choose to update All Investments, Current Portfolio, or Future Investments. Finally choose to allocate funds among any of the investment options listed by entering the specific percentage in the box to the right. Please note any changes you make will affect your investment elections for future contributions but will not change how the current balance in your HSA is invested.



HOW DO I TRANSFER FUNDS FROM ONE INVESTMENT TO ANOTHER?

To make changes to existing investment balances, you can use either the All Investments or Current Portfolio option under Manage Investments.

All Investments affects your entire account balance. A realignment initiates the sale of your existing investments and reinvests the proceeds according to your new investment instructions. Trades initiated before the market closes (3:00 p.m. CST) will be processed the same business day. Trades initiated after the market closes are processed at the close of the next business day.

Current Portfolio initiates a sale of one or more funds and a purchase into another fund or funds. Trades initiated before the market closes (3:00 p.m. CST) will be processed the same business day. Trades initiated after the market closes are processed at the close of the next business day.

