DRIVEN 125
BENEFIT ADMINISTRATORS

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

- Register Online: You will be prompted to update your password, complete security questions & sign your Terms & Conditions

- Start Investing and 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 over $2,000 or higher.

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:

1

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

2

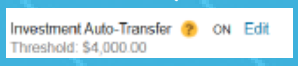
Click on the **Accounts** tab at top of Home Page and select a menu item from the Investment section

HOW DO I SIGN UP TO START INVESTING/SWEEP CASH TO INVESTMENTS?

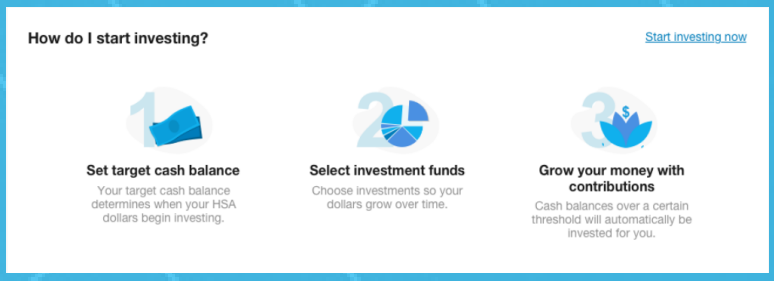
1. From the home page, access the Investments Summary page by clicking on the Manage Investments, button from the "I want to section" or click on **Manage Investments** from the Accounts menu.

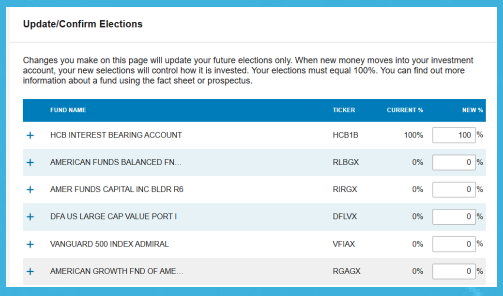
2. Once you get to the summary page, select the Start Investing button on the left-hand side of the screen.

3. Set auto-investment transfers to yes, and enter the dollar amount (above the noted minimum of $2,000) 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. To start investing you must have this investment auto-transfer initially set to yes. Once the first transfer is complete and your investment account is setup, you can change the threshold amount or turn off the auto transfer at any time and as often as you like .



4. You will then need to set your investment allocation. Change the defaulted elected fund and % to the fund elections and percentages you wish to invest in, making sure the total % equals 100%.



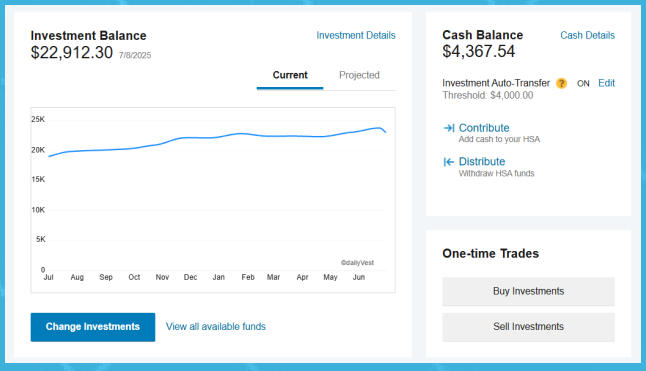


HOW DO I MANUALLY TRANSFER FUNDS?

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.

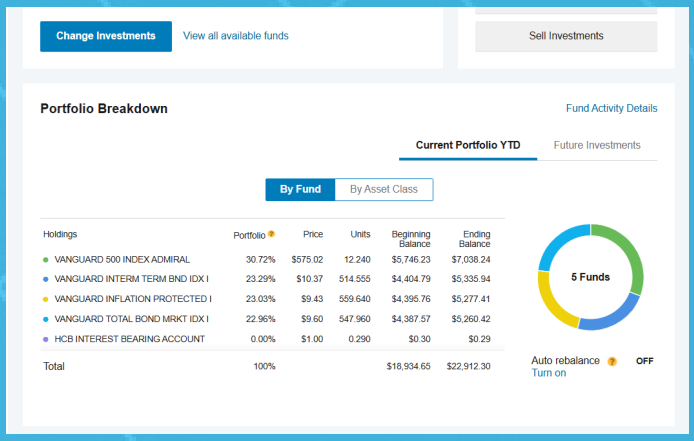


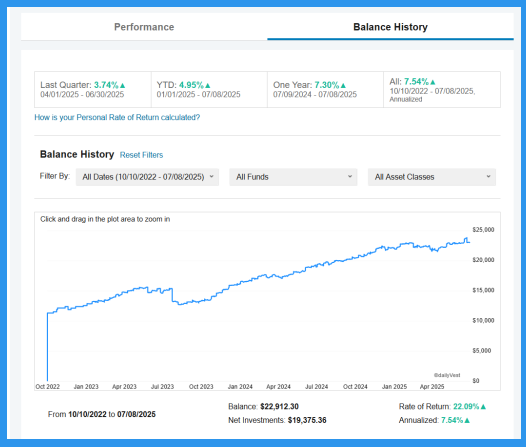
HOW DO I FIND MY INVESTMENT BALANCE?

You can find your HSA cash, and investment balances directly from the home page under the Accounts section under Account Summary. For more details click on 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. Here allows you to drill down into specific details regarding your investment account and allows you to manage your investment portfolio.



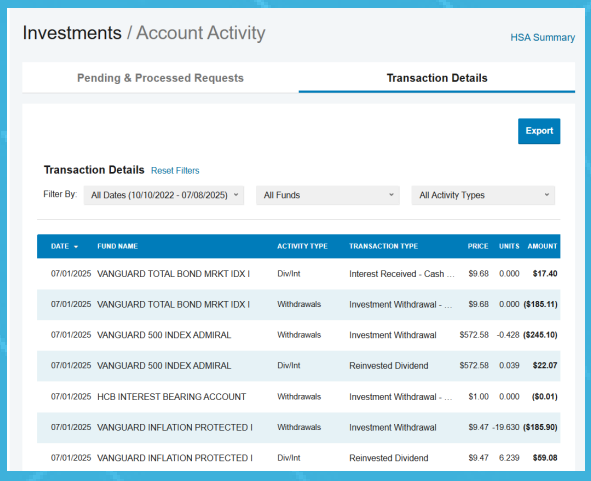


WHERE DO I FIND MY INDIVIDUAL INVESTMENT BALANCES?

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.

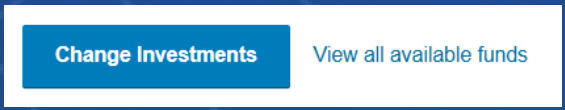
HOW CAN I FIND MY INVESTMENT TRANSACTION DETAIL?

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

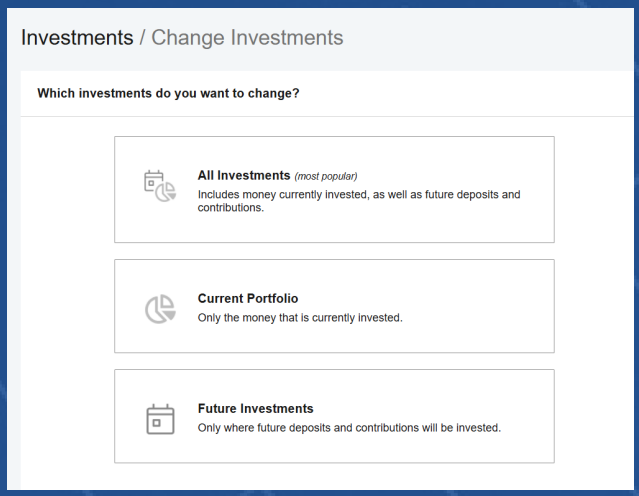


HOW DO I CHANGE MY INVESTMENT ELECTIONS?

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.



HOW DO I TRANSFER FUNDS FROM ONE INVESTMENT TO ANOTHER?

To make changes to existing investment balances, you can user 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.