



**AMERICAN BENEFITS GROUP**



# Health Savings Account Liquidating Investments

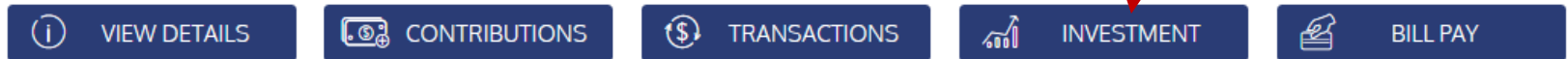


## Important - before you liquidate your investments

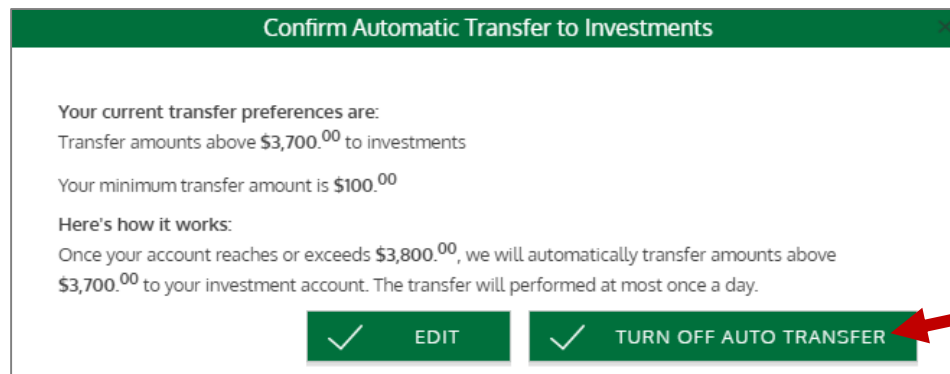
If you have setup **Automatic Transfers to Investments** you will want to turn this function off.

- Choose **Manage My HSA** under the **My HSA** tab

- Choose **INVESTMENT**

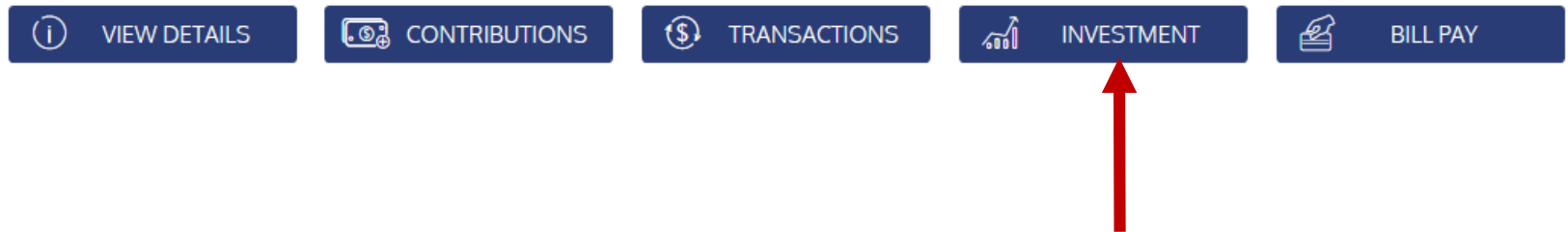


- Choose **EDIT AUTOMATED INVESTMENT TRANSFER**





- Choose **Manage My HSA** under the **My HSA** tab
- Choose **INVESTMENT**

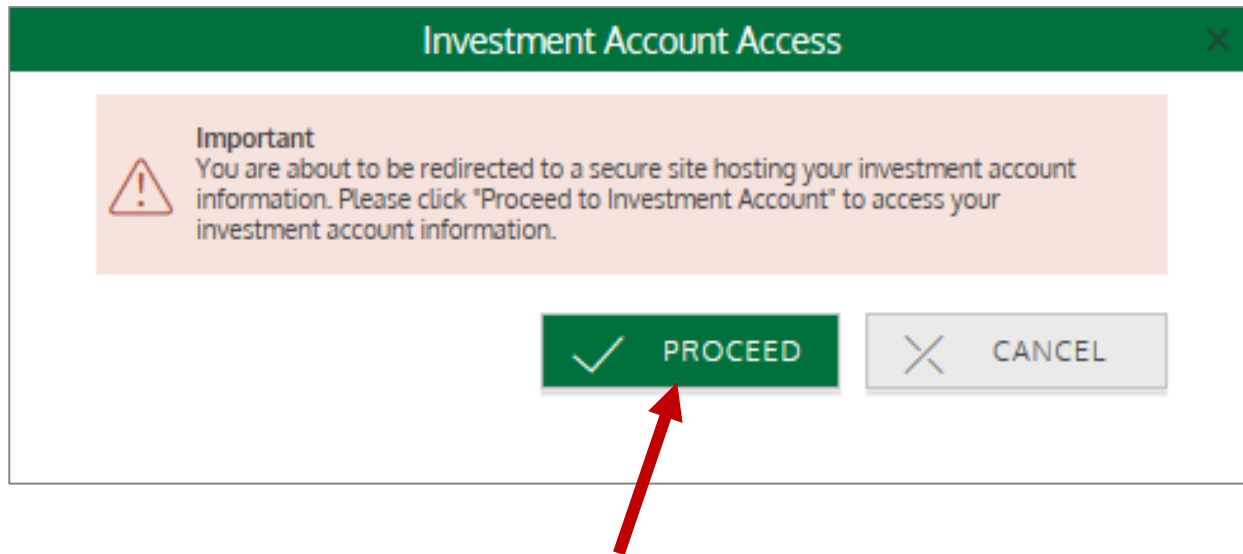


- Choose **VIEW/TRADE**





- If you experience issues when you “Proceed to Investment Account”, and are not using the Chrome browser, you may want to log back into your account in a Chrome browser window.





## Choose **Transfer Back to Base Account** under the **Move Money** menu.

Account Summary

Manage Investments

Move Money

Planning Tools

Statements and Activity

Help

### Transfer to HSA

Use this feature to **transfer money to your Deposit Account**. Requests entered on an active trading day by 4:00 p.m. ET will be processed same day. Changes on an active trading day after 4:00 p.m. ET will be effective the next active trading day.

Liquidations from your investment account for distributions to your Deposit Account will be liquidated proportionally based on your current asset model (Manage Investments Tab > Realign HSA Investments). Funds will be transferred from your HSA investment account to your Deposit Account within two banking business days following the settlement date.

#### Transfer Information

Total Account Balance	\$1,016.50
Amount Available	\$1,016.50

#### Transfer Information

Transfer Amount

Reason and Payment

Method

Reason for Transfer

Transfer Method

Submit Request



You can make your request on this page after selecting the default Reason and Payment Method. If successful, you can view Pending Activity to view the request.

### Transfer to HSA

Use this feature to **transfer money to your HSA Base Account**. Requests entered on an active trading day by 4:00 p.m. ET will be processed same day. Changes on an active trading day after 4:00 p.m. ET will be effective the next active trading day.

Liquidations from your investment account for distributions to your HSA Base Account will be liquidated proportionally based on your current asset model (Re-Allocate Portfolio page). Funds will be transferred by wire from your investment account to your HSA Base Account within two banking business days following the settlement date.

#### Transfer Information

Transfer Amount

Reason and Payment Method

Reason for Transfer

Transfer to Base Account ▼

Transfer Method

Transfer to Base Account ▼

Submit Request



800-499-3539

[support@amben.com](mailto:support@amben.com)

[www.amben.com/hsa](http://www.amben.com/hsa)