

**How Do HSA Investments Work?** The automated sweep feature has been disabled for your HSA. Before you can set your investments, you will need to have accumulated \$1,000 in your Cash Account. Once that threshold is met, follow the instructions below to invest your funds.

After you make your first investment buy into the funds available, you can then use this process to buy and sell at any point.

If you have already started investing, you must follow the steps below for any new buy or sell trades.

- 1 Sign into your account at [www.tasconline.com](http://www.tasconline.com).
- 2 From the top menu, select **SUPPORT › CONTACT US** to submit a support request.
- 3 Make these selections.

OFFERING TYPE

**Benefit plans**

TOPIC

**Investments**

TELL US MORE

**Review or change the threshold...**

- 4 Enter these instructions in the **DESCRIPTION** field.

- A** If you are transferring money **to your Investment Account** from your Cash Account:

*I would like to buy \$ [ ENTER DOLLAR AMOUNT ] in investments from my Cash Account.*

Allow 5-6 business days for completion. TASC will review the threshold and amount within the Cash Account to make sure you are eligible to invest and check the amount is available to invest.

- B** If you are transferring money **to your Cash Account** from your Investment Account:

*I would like to sell \$ [ ENTER DOLLAR AMOUNT ] from my investments to replenish my Cash Account.*

Allow 3-4 business days for completion. A sell trade will sell funds from your Investment Account based on your allocation in the Schwab Retirement Technologies (SRT) portal.

- 5 Click **SUBMIT**.

**QUESTIONS?** Call Customer Care at 608-241-1900 or (toll-free) 800-422-4661 from Monday - Friday between 8:00 AM - 5:00 PM (all time zones) or 24/7 for automated IVR assistance.