

How Do HSA Buy/Sell Trades Work? TASC has established a \$1,000,000 Buy/Sell Minimum Trade Threshold for the Broward County BOCC HSA. This is to prevent any buy or sell trade for an amount under that threshold from occurring, i.e., unless the trade is valued at \$1M or more.

This deactivates the automated sweep feature into and out of your Investment Account, and there is no automated sweep for those over the \$1,000 Cash Account threshold.

To initiate a buy or sell trade, simply submit a support request.

- 1 Sign into your account at 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 sweeping 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 sweeping 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.