

How to Begin Investing your HSA Funds

- Log into BRIWEB at: <u>https://participant.briweb.com/login</u> If this is the first time logging in, you will need to register for a login ID.
- 2. Click on the Health Savings Account tab. From the *I* want to...drop down menu on the right-hand side of the page, click Manage my HSA.

	Dashboard Health Savings Account							
Britemes	Health Savings.	Account	D	I want to				
HSA DEMOACCT ~	This health savings account will save you money on qualified health expenses.							
DASHBOARD	The largest selection of guaranteed HSA eligible products, zero guesswork.							
MEDICAL FSA/HRA								
DEPENDENT CARE FSA								
	Account Summary							
HEALTH SAVINGS ACCOUNT	ACCOUNT TYPE	PLAN YEAR	AMOUNT PAID	BALANCE				
	Health Savings Account	01/01/2023 - 12/31/2023	\$0.00	\$87.47				

3. Select **Invest** from the quick actions in the upper right corner. If you are looking to create an investment

account, you will be walked through the investment account set-up wizard. Click **Start Investing** to get started. **Upon completion, you** will receive immediate confirmation that your investment account has been created.

	Good evening, BECKY.		+ Deposit \$ Reimburn	e "d Invest 33 nufer
Health Wallet I Investments Profile	Add a recovery small Health Savings Account →			Dismis Adoreal
D Help Center	C HILL TOTAL \$500.05 \$500.05 wwillable to spend (2)	11 SEA INVESTMENTE > \$0.00	(0) (774): 54/14/00 (500.05 H5A + 8/14/00271	
	C. Filter by date range			_
	\$ Dec Interest payment: \$0.01	Jan 4	Interest Payment	\$0.01 >
	Nov Interest payment: \$0.01 Oct Interest payment: \$0.01	Dec 2, 2022 Nov 7, 2022	Interest Payment	\$0.01 > \$0.01 >

4. You will be brought to the Investment Dashboard. You can invest in 1000+ stocks and ETFs specifically screened by Morningstar Investment Management. To get started, begin typing the name or symbol of the investment. Once you have identified an investment, you will be presented with a performance summary and have the option to **BUY**.

BRI	660 Health Savings Investments
 Health Wallet Investments Profile 	Search for your first investment Transmission of the investment by Maningator Investment Management To them for module and ETFs
Help Center Log Out español	S0.00 +50.05 holy → 50.05 +50.05 holy



You are ready to make your purchase.



BRI



Investments are: Not FDIC Insured • May Lose Value • Not Bank Guarantee

What to Know:

- THERE IS NO MINIMUM TO INVEST. Invest for just \$1.00 per month. No separate trading fees.
- WHEN BUYING: All trades are made in real-time during regular trading hours. Purchases clear from HSA immediately. Fractional shares available.
- WHEN SELLING: It may take 2-3 days for proceeds to return to HSA balance. Investments not available for debit card purchases and online transfers.



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WHAT SHOULD I INVEST IN?

HSA Investing is self-directed. You are permitted to invest your HSA funds in 1000+ stocks and ETFs specifically screened by Morningstar Investment Management. Please consult a registered investment advisor for recommendations and investment advice.

WHAT TIPS DO YOU HAVE FOR SEARCHING FOR INVESTMENTS?

Benefit Resource is not a registered advisor and cannot provide advice regarding specific investment selections. However, here are a few tips you may use when searching for investments.

 I HAVE IDENTIFIED A STOCK I WOULD LIKE TO INVEST IN.

(Examples: 3M, Apple, Amazon)

Image: Second Secon

To purchase a stock, simply enter the name or stock symbol in the search bar. A summary of the stock is presented including market stats. You will be able to invest in most stocks available through the New York Stock Exchange. Certain low value or low performance stocks may not be available. View directory of stocks available on the <u>New York Stock Exchange</u>.

• I WOULD LIKE TO INVEST IN SIMILAR INVESTMENTS TO MY 401K.

You may be able to invest in the same or similar investments to your 401K. Common search options include:

- o Vanguard
- o Schwab
- o Fidelity
- o Morningstar

• I WOULD LIKE TO INVEST IN SPECIFIC TYPES OF INVESTMENTS.

Common search terms you may want to use if you know the types of investments you would like to consider:

- o Emerging Markets
- o International Equity
- o Aggregate
- o Treasury
- o Bond
- o Small cap
- o Mid cap
- o Large cap
- o Real-estate
- o Short-term
- o Long-term
- o Growth
- o Value

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