

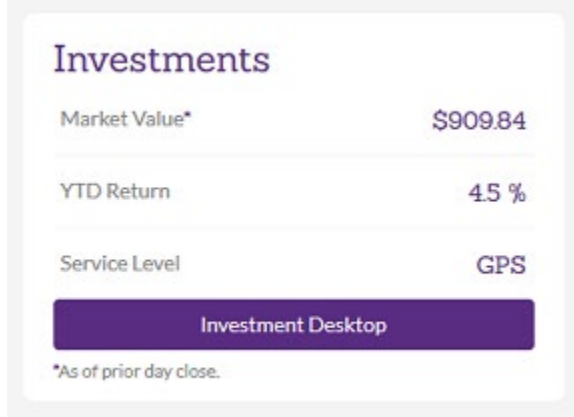
# Sell investments

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## How do I sell or liquidate my HSA investments?

Below are steps to sell shares that you have purchased with funds from your health savings account (HSA). You must sell all shares to transfer your HSA to another custodian.

1. On the home page of the HealthEquity member portal, scroll down to investments:



2. Confirm that your investments are ready to be sold by reviewing the following information:
  - If your market value is \$0, there are no funds currently invested.
  - If you have a 'Service Level' of 'AutoPilot' and want to sell funds, but continue receiving advice, you will need to switch to the 'Service Level' of GPS.
  - If you intend to sell all shares but have a 'Service Level' of AutoPilot, you need to switch to GPS or [cancel Advisor™](#) before continuing this process.
3. Click the 'Investment Desktop' button.
4. Select the 'Trade' tab.
5. There are two options for selling funds:
  - **To sell individual funds**
    - - Locate the box titled 'Trade'.
      - Click the 'View Available Trades' button.
      - Review the list of funds in your portfolio. Any funds with a 'closing value' over \$0 can be sold.
      - Choose 'Sell' from the drop-down box to the right of each individual fund you are selling. Investors will receive the net asset value (NAV) on the date of trade execution.
        - To **liquidate** your entire position in the individual fund, choose 'Sell All' instead.
      - Click the 'Review Trades' button near the bottom of the screen.
      - Confirm your trades on the next screen, and click 'Submit Trades.'
    - **Sell funds based on target holdings**
      - - Locate the box titled 'Sell using my estimated % holdings.'
        - Enter the total amount you wish to sell in the 'Amount to sell' box.
        - Click 'Review Trade'.
        - Confirm your trades on the next screen, and click 'Submit Trades.'

Trades will be executed and settled as cash in your HSA within five business days.

Note: Trades are not placed until you complete the above steps.

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