

**How to
Liquidate
Investments
from CYC
Investment
Center**

Step by Step—Liquidate Investments

1. Log into your account at connectyourcare.com and click the “Investments” link from the home page or “Manage HSA Investments” from the “I want to” drop down menu

The screenshot shows the ConnectYourCare website interface. At the top right, there is a green button labeled "Make a Payment". Below the navigation bar, a message states: "Last login: Monday June 03, 2019 There have been 2 unsuccessful login attempts since your last login." The main content area features a table with three columns: "Investments" with a value of \$1,339.37, "HSAOD" with a value of \$1,261.76, and "Contributions YTD" with a value of \$1,576.80. A red arrow points to the "Investments" column header. Below the table, there is a "Last 12 Months" filter with a dropdown arrow. A "I Want To..." dropdown menu is open, showing a list of actions: "More actions...", "View HSA On Demand Activity", "Manage HSA Contributions", "Manage HSA Investments" (highlighted in black), "Go to my HSA Save-It!", "Make HSA Save-It! Record", "View Statements", and "View HSA Tax Information". A red arrow points to the "I Want To..." header.

Investments	HSAOD	Contributions YTD
\$1,339.37	\$1,261.76	\$1,576.80

Last 12 Months

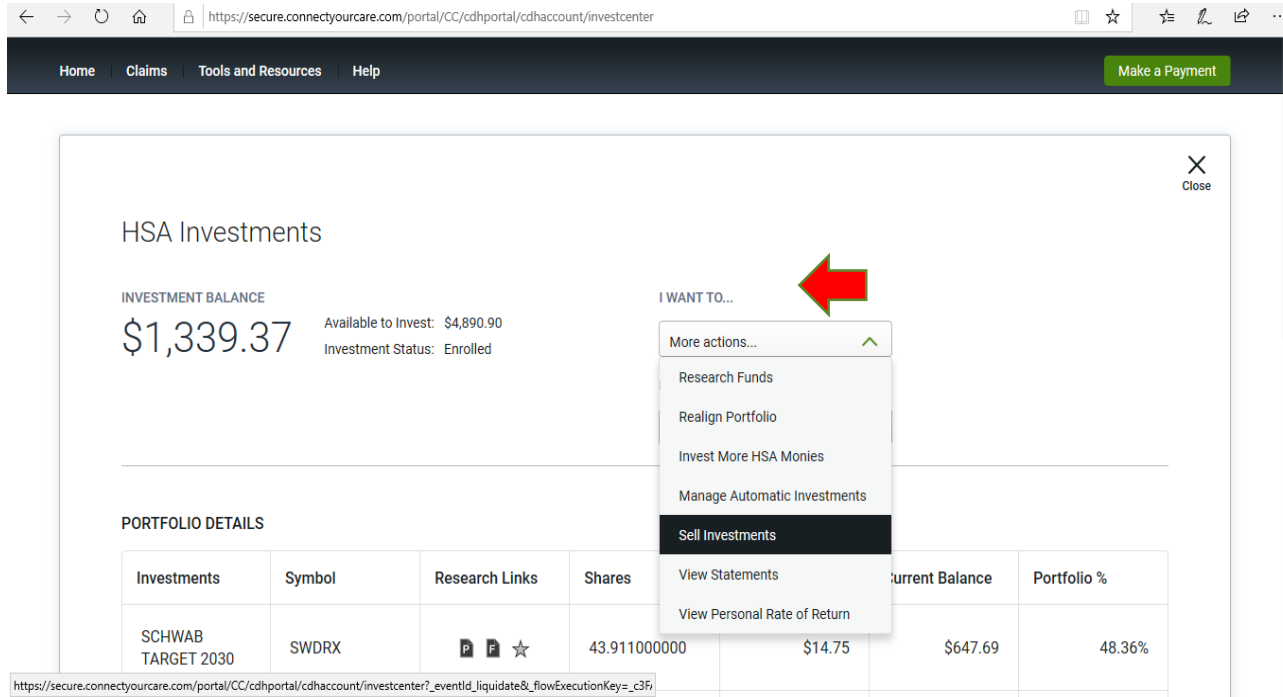
I Want To...

- More actions...
- View HSA On Demand Activity
- Manage HSA Contributions
- Manage HSA Investments**
- Go to my HSA Save-It!
- Make HSA Save-It! Record
- View Statements
- View HSA Tax Information



Step by Step—Liquidate Investments

- From the HSA Investments page select Sell Investments from the “I want to...” drop down menu



The screenshot shows a web browser window displaying the HSA Investments page. The page title is "HSA Investments" and it shows an investment balance of \$1,339.37. The available amount to invest is \$4,890.90, and the investment status is "Enrolled". A red arrow points to the "I WANT TO..." dropdown menu, which is open and shows the following options: "More actions...", "Research Funds", "Realign Portfolio", "Invest More HSA Monies", "Manage Automatic Investments", "Sell Investments" (highlighted), "View Statements", and "View Personal Rate of Return". Below the dropdown menu is a table of portfolio details.

Investments	Symbol	Research Links	Shares	Current Balance	Portfolio %
SCHWAB TARGET 2030	SWDRX		43.91100000	\$14.75	\$647.69 48.36%



Step by Step—Liquidate Investments

3. From the Liquidate Investments page select the “Liquidate Entire Portfolio” button

INVESTMENT BALANCE
\$1,339.37 Available to Invest: \$4,890.90
Investment Status: Enrolled

I WANT TO...
More actions... ▼

EDUCATION & TOOLS
More actions... ▼

LIQUIDATE INVESTMENTS

SELL FUNDS BACK TO MY HSA DEPOSIT ACCOUNT

For each investment listed below, enter the dollar amount that you would like to sell. HSA Investments are liquidated in accordance with the [HSA Terms & Conditions](#).

Liquidate Entire Portfolio

Investments	Funds Category	Current Balance	Current Allocation	Amount to Liquidate	Liquidate 100% of This Fund
MFS International Value	International	\$691.68	51.6399993896%	<input type="text"/>	<input type="checkbox"/>
Schwab Tarnet 2030	Tarnet Date	\$647.69	48.3600006103%	<input type="text"/>	<input type="checkbox"/>



Step by Step—Liquidate Investments

4. Then select “submit” on the next screen to confirm the liquidation

The screenshot shows a web browser window with the URL <https://secure.connectyourcare.com/portal/CC/cdhportal/cdhaccount/investcenter>. The page displays the following information:

Investment Status: Enrolled

EDUCATION & TOOLS

LIQUIDATE INVESTMENTS

Confirm your sell transaction by clicking the Submit button below. The actual sell amount can vary slightly based on the [HSA Terms & Conditions](#).

You currently have automatic investments setup. Selling any funds will temporarily pause all automatic investments for 30 days. They will resume 31 days after the sell is initiated.

Investments	Funds Category	Portfolio Percentage	Current Balance	Amount to Liquidate
MFS International Value	International	51.6399993896484375%	\$691.68	\$691.68
Schwab Target 2030	Target Date	48.3600006103515625%	\$647.69	\$647.69
			Totals	\$1,339.37

At the bottom of the page, there are three buttons: "Back", "Cancel", and "Submit". A red arrow points to the "Submit" button.

Step by Step—Liquidate Investments

5. You will then receive a confirmation screen with a confirmation #

The screenshot shows a web browser window with the URL <https://secure.connectyourcare.com/portal/CC/cdhportal/cdhaccount/investcenter>. The page title is "HSA Investments".

INVESTMENT BALANCE
Available to Invest: \$4,890.90
Investment Status: Enrolled

\$1,339.37

I WANT TO...
More actions... ▼

EDUCATION & TOOLS
More actions... ▼

LIQUIDATE INVESTMENTS

Confirmation #6375924

Your automatic investments have been temporarily paused. They will resume on 07/03/2019.

[< Back to HSA Investments](#)

Disclaimer: Investments in mutual funds are not FDIC insured, not bank issued or guaranteed, and are subject to risk, including fluctuations in value and the possible loss of the principal amount invested. Please consult your financial planner for more information.

