

# HSA GUIDANCE TOOL HANDOUT

The HSA Investment Guidance Tool in the Discovery Benefits consumer portal lets participants take financial planning into their own hands and make wise investments with their HSA funds.

Using the guidance tool, participants can:

- Determine healthcare expense needs after retirement and create strategies for meeting those needs
- Track multiple HSA accounts and healthcare expenses
- Obtain a personalized risk assessment
- Access probability simulations to estimate a healthcare balance at retirement
- Learn more about their investment options.
- View recommendations for specific asset class allocations
- Get help with meeting their investment goals

To access the tool, participants should click on the “Investment Guidance Help” tab from their HSA Investment Portal.



From there, they'll be able to access the guidance tool, where they can navigate through a “Strategy Builder” that lets them view information about their current account, estimate medical expenses, set investment goals and create an action plan for their savings goals, complete with a comprehensive risk assessment.

