

Liquidate Funds on HSBA Schwab.com to move to the Further HSA

To make funds available for transfer back to your HSA, you must complete the following steps on <http://www.schwab.com>:

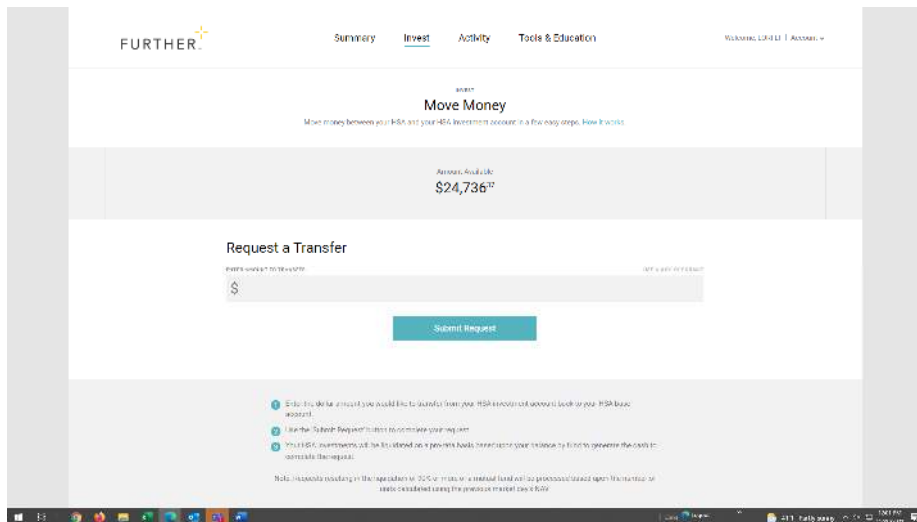


1. Sell your current holdings to move the funds into a cash position
2. Upon settlement complete the following steps to move the cash position to the HSA.

Transfer funds on the investment site

1. Sign in at www.hellofurther.com.
2. In the *My Accounts* section, locate your HSA in your list of accounts.
3. Click **View Account**.
4. Locate the *Investments* section of the account page by scrolling past the *Recent Activity* section.

5. Click **Visit Investment Site**. The investment site will be displayed.



The screenshot shows the FURTHER Invest website. The top navigation bar includes 'Summary', 'Invest', 'Activity', and 'Tools & Education'. The 'Invest' tab is selected. Below the navigation bar, the 'Move Money' section is displayed, showing the account balance as '\$24,736.12'. The 'Request a Transfer' section is visible, featuring a text input field for the amount to transfer, a 'Submit Request' button, and a list of instructions for the transfer process. The instructions include: 1. Enter the dollar amount you would like to transfer from your HSA investment account back to your HSA bank account. 2. Use the 'Submit Request' button to complete your request. 3. Your HSA investments will be liquidated as a proceeds funds, then your request will be processed to generate the cash to complete the request. A note at the bottom states: 'Note: Investments including in the equities for 30-day transfer is required (and will be processed) based upon the number of days included using the process on market day 10/10/2020'.

6. Scroll over the **Invest** tab and choose **Move Money**.

7. Go to **Request a Transfer**

8. Enter the amount to transfer to your HSA. (Enter the dollar amount without using the \$ symbol, i.e. 5000.00).

9. Click **Submit**.

This process can take up to 3-4 business days to complete and to be able to view the money in your HSA.