

If you participated in Optum's HSA investments, and you want to transfer those dollars to NueSynergy, you will need to **close your Optum investment account**. If you are not certain whether you have dollars in the investment account, you can check your account by logging into Optum or calling customer service at 1-877-470-1771 (they are open 24/7).

1. Once you log into your Optum account, on the home page you will see any dollars available in the a) Cash Account and b) **Investment Account**.
  - a. The cash account dollars will be transferred using the HSA Transfer Request form
  - b. In order for the **Investment Account** dollars to be transferred you will need to take the following steps to close the **Investment Account**.
2. Write down your Investment Account dollar amount reflected on the home page as you will need that information later.
3. On the home page, click the blue box "Manage Investments" and on the "Accounts/Investments/Summary" page, click on Manage Investments on the left side.
4. Click on the Update for "Auto-Transfers to or from an Investment Account"

**Auto-Transfers to or from an Investment Account:**

Turn transfers on or off to or from your investment account, as well as change the threshold amount that controls automatic transfers to your investment account.

Update

Investment Transfer Threshold: \$1,000.00

5. Enter the Investment Account dollar amount that was on your Optum home page AND then enter No for "Would you like auto-investment transfers on". The system will not let you enter no first and then the dollar amount; you have to enter the dollar amount first and then change the yes to a no.

**Investment Transfer Threshold**

You are eligible to invest a portion of the funds from your health saving account into an investment account. By setting your investment transfer threshold below, we will automatically sweep funds into the investment account once your available cash balance exceeds the sweep threshold amount by \$100.01 or more. Likewise when your available cash account balance falls below the sweep threshold by \$100.01 or more, funds will be automatically swept back to your cash account from your investment account.

Your investment transfer threshold may be set equal to or above \$1000. Please enter a value that is an increment of 100.

Would you like auto-investment transfers on?

Yes  No

Transfer Funds to Investment When My Cash Balance Exceeds:

\$ 1000

Investment Services: Not FDIC Insured • No Bank Guarantee • May Lose Value

6. You should receive this "success" message. Optum indicates it will take several business days for this transfer to be completed//. If you encounter difficulties or have questions, please contact Optum at 1-877-470-1771 (24/7).

**Accounts / Investments / Manage Investments**

**Success**  
You have successfully submitted Investment Transfer Threshold updates for your investment account.