

# Liquidating and Closing HSA Invest Accounts

## Customer Flyer

To liquidate your investments, please log in to your investment platform and follow the below steps.



**1. Click on Manage Investments**



**Manage Investments**



**2. Select the platform your funds are invested in (Select, Choice or Managed)**



**3. Complete the following:**

- Next to each investment select **Trade**
- Select **Sell**
- Select **Sell all**
- Click **Confirm Sell**



**4. Call to Close your Investments**

After the transfer to the HSA Account is complete and your brokerage account is at a **\$0.00** balance, please call HSA Bank to close your brokerage account.

**HSA Bank Client Assistance Center (800) 357-6246, Open 24/7**



*The closing process can take between 5 and 25 days depending on your investments.*

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