

Aptia WealthCare Saver HSA

User Experience

Account Opening-Account Selection Page

The screenshot shows a web interface for selecting an investment account type. At the top, there is a navigation bar with a 'MENU' icon, the word 'Investments', and utility icons for 'FSA/DESA', 'HAWKUSA', 'Notifications', and a user profile 'Hi, Self Directed Thirteen'. Below the navigation bar is a grey header with 'HSA ACCOUNT' in a blue pill. The main content area features a large heading 'Great!' followed by the instruction 'Please select your preferred Investment account type.' Three cards are presented side-by-side: 'Managed', 'Self-Directed', and 'Brokerage'. Each card includes a fee schedule, a description of the investment approach, a gauge chart labeled 'Effort to Manage', and a 'SELECT' button. A 'RISK DISCLOSURE' section is located at the bottom of the cards. The footer contains links for 'ABOUT US', 'TERMS OF USE', and 'PRIVACY POLICY', along with a copyright notice for 2017 Consumer Funding Solutions.

Investments

Hi, Self Directed Thirteen

HSA ACCOUNT

Great!

Please select your preferred Investment account type.

Managed

0.075% of investment balance charged monthly in arrears
Fee example: If you had a \$5,000 investment balance, you would be charged \$3.75 per month

Designed for novice investors who prefer to have our advisor tool automatically select and rebalance investments on an ongoing basis in accordance with their age and/or risk profile. This account type delivers a "do-it-for-me" approach to investing.

Effort to Manage

SELECT

Self-Directed

0.033% of investment balance charged monthly in arrears
Fee example: If you had a \$5,000 investment balance, you would be charged \$1.67 per month

Designed for intermediate investors who have the desire to self-select from a menu of monitored investment options covering multiple asset classes to diversify their portfolio, and then rebalance their portfolio manually. This account type provides a balance between do-it-for-me and DIY.

Effort to Manage

SELECT

Brokerage

0.033% of investment balance charged monthly in arrears
Fee example: If you had a \$5,000 investment balance, you would be charged \$1.67 per month

Designed for adept investors who desire to perform advanced research and trading across hundreds of individual stocks and ETFs. This account type offers a hands-on, DIY approach to investing.

Effort to Manage

SELECT

RISK DISCLOSURE: Investing in securities involves risk of loss that HSA investors should be prepared to bear. No investment process is free of risk; no strategy or risk management technique can guarantee returns or eliminate risk in any market environment. Past performance is not a guarantee of future results. The value of investments, as well as any investment income, is not guaranteed and can fluctuate based on market conditions. Diversification does not assure a profit or protect against loss.

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Account Opening-Initial Transfer

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Account Funding

Your current HSA cash balance is \$2,892.70.
You need to keep a minimum balance of \$10.00 in your HSA cash account.
The amount you have available to invest is \$2,882.70.

Choose how much money you want to invest.

\$250.00 \$500.00 \$1K \$2K ALL

or Enter Amount:

You will be investing

\$500.00

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Managed Recommended Portfolio

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Recommended Portfolio Allocation

Based on your risk questionnaire answers, our advisor tool has determined the following portfolio allocations will best meet your needs. Click the Review Order button to select your portfolio.

Total Amount Investing: \$500.00

Current Portfolio

- HSA Cash 100.00%

Recommended Portfolio

- Inflation-Protected 12.12%
- U.S. Small Cap 7.96%
- Natural Resources 7.96%
- U.S. Large Cap 7.96%
- International Bonds 12.12%
- Commodities 7.96%
- Government Bonds 12.12%
- Real Estate 7.96%
- Emerging Markets 7.96%
- Developed International 7.96%
- U.S. Mid Cap 7.96%

Moderate portfolio for moderately optimistic investors

Name	Ticker	Resource Link	Allocation %	\$ Amount
INFLATION-PROTECTED				
Schwab US TIPS ETF	SCHP	🔗	12.12%	\$60.00
U.S. SMALL CAP				
Core S&P Small-Cap ETF iShares	IJR	🔗	7.96%	\$39.80
NATURAL RESOURCES				
Materials Select Sector SPDR ETF	XLB	🔗	7.96%	\$39.75
U.S. LARGE CAP				
Core S&P 500 iShares ETF	IVV	🔗	7.96%	\$39.80
INTERNATIONAL BONDS				
Total International Bond Index Vanguard	BNDX	🔗	12.12%	\$60.00
COMMODITIES				
ETFs Bloomberg All Commodity Strategy K-1 Free ETF	BCI	🔗	7.96%	\$39.80
GOVERNMENT BONDS				
Vanguard Short-Term Government Bond ETF	VGSH	🔗	12.12%	\$60.00
REAL ESTATE				
Schwab U.S. REIT ETF	SCHH	🔗	7.96%	\$39.75
EMERGING MARKETS				
Emerging Markets Stock Idx. ETF Vanguard	VWO	🔗	7.96%	\$39.75
DEVELOPED INTERNATIONAL				
FTSE Developed Market Index ETF Vanguard	VEA	🔗	7.96%	\$39.75
U.S. MID CAP				
S&P MidCap 400 Index iShares	IJM	🔗	7.96%	\$39.80

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REVIEW ORDER

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Managed Risk Questionnaire

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Risk Questionnaire

Please answer the following questions to have a portfolio selected for you. Feel free to adjust these answers at anytime for a new portfolio.

Automatically calculate your investment risk based on your age.

0-40
41-55
56-65
66-110

41-55

How do you feel about the market in the short term (next 6-12 months)?

Very Pessimistic
Moderately Pessimistic
Neutral
Moderately Optimistic
Very Optimistic

Moderately Optimistic

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HSA ACCOUNT

Automated Investment Transfer

What is the amount you want maintained in your HSA account?
The amount should be more or equal to \$1,000.00 *

\$ 1,000.00

What is the minimum amount you would like to set for the recurring transfer?
Minimum auto transfer amount should be more or equal to \$1.00 *

\$ 10.00

I understand that once my HSA account reaches or exceeds \$1,010.00, we will automatically transfer amounts above \$1,000.00 to your investment account. This transfer will be performed at most once a day based on your end of day balance.

Click Save to accept these settings.

SAVE
Cancel

Brokerage Dashboard

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HSA ACCOUNT

Investment Balance
\$17,622.28
Updated 04/19/2022 @ 8:56AM

Total Return
\$10,736.15
From 08/02/2021 to 04/19/2022

Last 90 Days
\$10,828.34 ↑
From 01/19/2022 to 04/19/2022

Cash Available to Invest
\$30,158.73

\$17,622.28
Apr 19, 2022

You can invest your dollars into the market by buying instruments. Search for instruments below, or leverage the "Frequently Traded Stocks" and "Frequently Traded ETF's" to quickly pick instruments.

Portfolio

Name	Ticker	Balance	Shares	Today	Total Return
Apple, Inc.	AAPL	39,722.06	38.90	-0.08%	-\$202.34
1-800-FLOWERS.COM, Inc.	FLWS	5041.99	44.92	1.49%	-\$356.04
JAMP HOLDING CORP	JAMP	65,119.06	156.12	0.06%	\$166.01
Roku, Inc.	ROKU	\$1,839.39	17.34	3.43%	-\$2,060.61
10X CAPITAL VENTURE ACQUISITION CORP III	VCCXLU	\$198.21	19.8	0.1%	-\$0.79

Frequently Traded Stocks (select to view details)

AAPL

F

GE

T

BAC

TSLA

WFC

INTC

PFE

MSFT

Frequently Traded ETFs (select to view details)

SPY

XLF

QQQ

EEM

EWZ

XLE

IWM

SLV

GDX

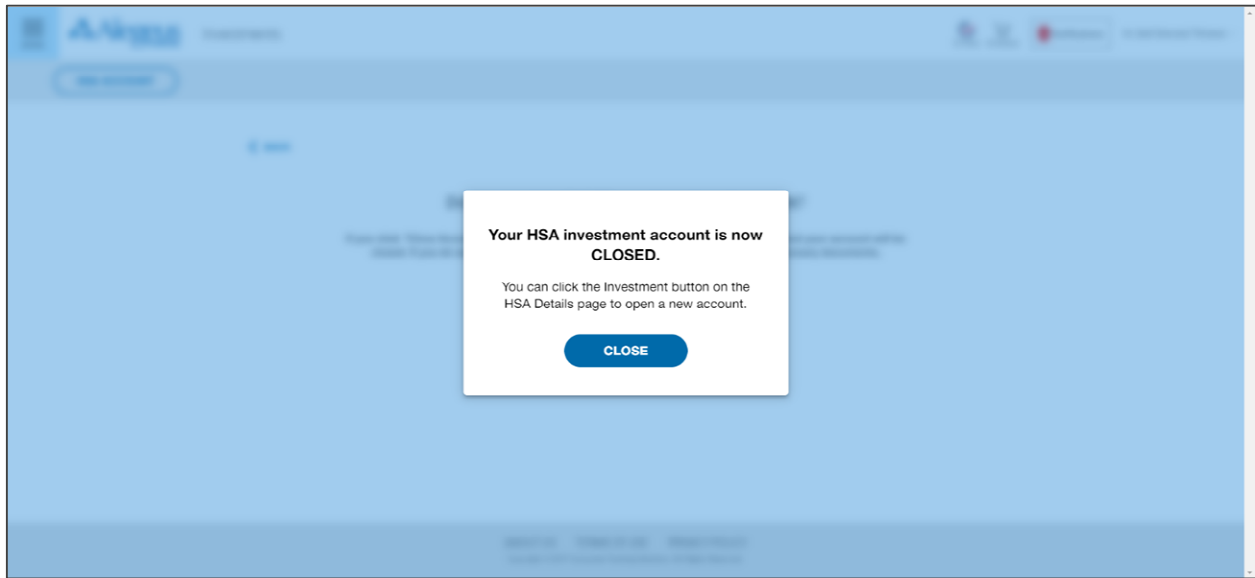
EFA

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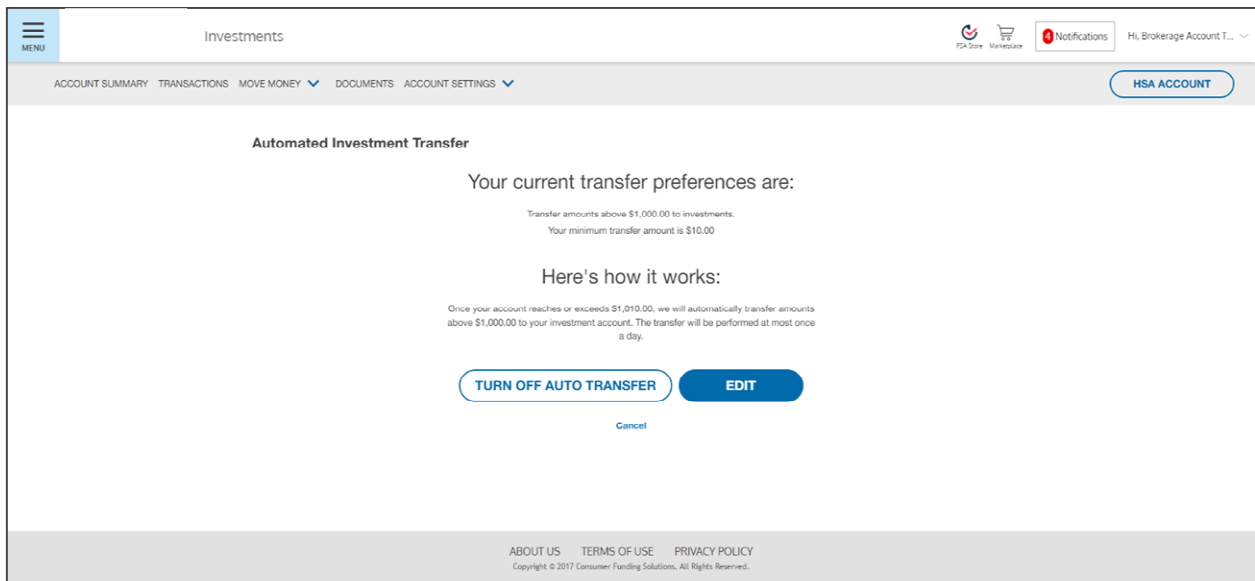
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Contact Customer Care: | sales@beta.healthcareportal.com

Closed Investment Account Confirmation



Current Automated Transfer Settings



Disclosure Agreements

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Hi, RIMtest1

HSA ACCOUNT

Disclosure Agreements

Please review the disclosure agreements below in order to proceed.

- ▶ CAPTRUST Relationship Summary
- ▶ CAPTRUST Form ADV Part 2
- ▶ Risks Associated with Investing
- ▶ DriveWealth Privacy Policy
- ▶ DriveWealth Disclosures & Agreements for Opening a Managed Account*
- ▶ DriveWealth Disclosures & Agreements for Opening a Self-Directed or Brokerage Account Type*
- ▶ HSA Investment Terms & Conditions
- ▶ Investment Fee Schedule
- ▶ FundList For Healthcare Saver Investments
- ▶ Investment Fund List (Self-Directed)

*Your acceptance of the terms for Managed, Self-Directed and Brokerage account types allows you to open any one of these account types, and gives you the option to change account types should you choose to do so.

By checking this box, you acknowledge that you have read and agree to each of the disclosures and agreements listed above.

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Disclosures

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Disclosures

According to federal regulations, you must disclose the following accordingly.
For most people, none of these will apply.

I am affiliated with or work for a broker/dealer

I am a 10% shareholder or director of a publicly traded company

I am or an immediate family member is a current or former Politically Exposed Person/Public Official

None of these apply (most common)

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HSA ACCOUNT

Apple, Inc.
AAPL

Price
\$165.01

Your Market Value
\$9,722.66

\$165.01
+\$0.41

HSA Dollars Available to Invest

\$30,158.73

Buy AAPL

Invest In Dollars

Amount

Est. Quantity 0.03 shares

You are placing a good for day market order to purchase \$5 of AAPL based on the current market price of \$165.01. You will receive approximately 0.03 shares. Your order will be executed at the best available price.

BUY

EDIT

Your Investment

Market Value	\$9,722.66	Cost/Share	\$170.07
Today's Return	-\$7.66 (-0.08%)	Shares	56.95
Total Return	-\$302.34	Portfolio Diversity	55%

About

Apple Inc. designs, manufactures and markets smartphones, personal computers, tablets, wearables and accessories, and sells a variety of related services. The Company's products include iPhone, Mac, iPad, and Wearables, Home and Accessories. iPhone is the Company's line of smartphones base... [Read more](#)

Market Cap	Price-Earnings Ratio	Dividend Yield	Resource Link
2.7T	28.29	0.52	🔗

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Contact Customer Care | info@beta.welltheportal.com

HSA Account Details

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HSA Account Details

Hi, Brokerage Account T...

WealthCare Saver HSA - WCSHSA *****8542

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Account Resources | Tax Forms | Statements | View Beneficiaries | Learn More About Investments

Go Green! Opt in for electronic delivery of HSA tax forms and to avoid a yearly fee of \$150

Account Balance

\$3,585.07

Available Cash	\$3,086.29
Investment Balance	\$498.78
Holds	\$0.00

Balance

Cash Available to Spend	\$3,086.29
Holds	\$0.00
Investment Balance	\$498.78
Total Balance	\$3,585.07
Overpaid Amount	\$0.00

Current Year Deposits

Your Deposits YTD	\$0.00
+ Employer Deposits YTD	\$0.00
= Total Deposits YTD	\$0.00

Employer Deposits	\$0.00
Your Deposits	\$0.00
Total Deposits	\$0.00

Prior Year Deposits

Your Prior Year Deposits	\$3,000.00
+ Employer Prior Year Deposits	\$0.00
= Total Prior Year Deposits	\$3,000.00

Employer Prior Year Deposits	\$0.00
Your Prior Year Deposits	\$3,000.00
Total Deposits	\$3,000.00

HSA Stats

Contributions - Reportable	\$0.00
Total Contributions	\$0.00
Rollover Contributions	\$0.00
Distributions / Spent Year to Date	\$0.00
Interest Paid	\$0.29

HSA Stats

Contributions - Reportable	\$3,000.00
Rollover Contributions	\$0.00
Distributions / Spent Prior Year	\$0.00

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Instrument Detail

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Short-Term Bond ETF Vanguard
BSV

Balance	\$498.78
Units	6.45
Today	-0.06% ↓

\$77.38

+\$0.00

Apr. 19, 2022 @ 7:54AM

1W
1M
6M
1Y
ALL

Your Investment

Market Value	\$498.78	Cost/Share	\$77.38
Today's Return	-0.32 (-0.06%)	Shares	6.45
Total Return	-\$1.22	Portfolio Diversity	100%

Instrument Details

Market Cap	0
P/E Ratio	0
Dividend Yield	1.16
Resource Link	↗

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Investment Transaction History

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Date Range

Dividends

Buy

Sell

Clear

Apple, Inc. | Buy

\$100.00

February 14, 2022 0.59192612 shares at \$ 168.94

Symbol	Filled quantity	Total
AAPL	0.59192612 shares at \$ 168.94	\$100.00
Type	Filled Date	
Buy	February 14, 2022 11:42 AM EST	
Submitted	Entered Amount	
February 14, 2022	\$100.00	

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Investment Balance

\$498.78

Updated 04/19/2022 @ 7:51AM

Total Return

\$0.00

From 04/12/2022 to 04/19/2022

Last 90 Days

\$0.00

From 04/12/2022 to 04/19/2022

Cash Available to Invest

\$3,076.29

Auto Transfer EDIT

ACTIVE

Transfer amount: Above \$1000
Min. transfer amount is: \$10

\$498.78

-0.45

Apr. 19, 2022

1W
1M
6M
1Y
ALL

You can rebalance your portfolio using the Reallocate Funds button under the Move Money menu item at anytime.

Portfolio Allocations

Name	Ticker	Balance	Portfolio%	Units	Today
Short-Term Bond ETF Vanguard	BSV	\$498.76	100%	6.45	-0.00%

Landing Page – Eligible to Invest

Investments

Hi, Ritesh

HSA ACCOUNT

Hi Ritesh, welcome to your HSA investment experience!

Investing your HSA is a great way to maximize your earning potential, and we can't wait for you to get started. Unfortunately, your investment account can only be opened during market hours – Monday through Friday from 9:30 a.m. - 4:00 p.m. ET (except stock market holidays).

Please return to this page during market hours to create your investment account and take full advantage of all the saving opportunities your HSA delivers.

Accelerate your retirement savings by investing your HSA.

Your HSA is undeniably a great tool to help you pay for current and future healthcare expenses, but it's also a powerful investment vehicle.

RETIREMENT READINESS

According to a recent study, the average retired couple age 65 will need approximately \$300,000 saved (after tax) to cover healthcare expenses in retirement.*

TAX FREE

Whether you're growing your investment earnings or withdrawing funds for qualified medical expenses, it's always tax free.

EASY SPENDING

You can easily move funds from your investment account back into your HSA spending account as often as you like.

FLEXIBLE ACCESS

After age 65, you can use your HSA funds for non-medical expenses without paying a penalty.

Investment options to fit your unique needs

Your HSA investment experience was designed for ultimate flexibility. Once you create an investment account, you'll have three investment account types to choose from: Managed, Self-Directed and Brokerage.

To ensure your investment experience is always aligned with your unique needs, you have the option to switch from one investment account type to another, no matter where you are in your investment journey.

MANAGED

Designed for **novice** investors who prefer to use an automated tool to select and manage their investments on an ongoing basis in accordance with their age, risk profile and time horizon. This account type delivers a hands-off "set it and forget it" approach to investing.

SELF-DIRECTED

Designed for **intermediate** investors who have the desire to self-select from a menu of monitored investment options covering multiple asset classes to diversify their portfolio, and then rebalance their portfolio manually. This account type provides a balance between structure, control and time requirements.

BROKERAGE

Designed for **expert** investors who desire to perform advanced research and trading across thousands of available investment instruments. This account type offers a hands-on, D.Y. approach to investing.

*Fidelity. (2021, May 6). How to plan for rising health care costs. www.fidelity.com/viewpoints/retirement/financial-planning/health-care-costs

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1/11/18

Landing Page-Market Not Open Yet

Investments

HSA ACCOUNT

Hi RIAtest, welcome to your HSA investment experience!

There's no doubt your HSA is a great way to pay for current-year eligible medical expenses, but did you know it can also be used as a long-term investment vehicle? By investing your HSA, you give your money a chance to grow, maximizing opportunities to boost your savings and prepare for the future, including retirement.

Currently, you have \$1,990.00 available to invest.

Opening an investment account is simple. To take full advantage of all the long-term savings opportunities your HSA delivers, click the button below!

START INVESTING

Accelerate your retirement savings by investing your HSA.

Your HSA is undeniably a great tool to help you pay for current and future healthcare expenses, but it's also a powerful investment vehicle.

RETIREMENT READINESS

According to a recent study, the average retired couple age 65 will need approximately \$300,000 saved (after tax) to cover healthcare expenses in retirement.*

TAX FREE

Whether you're growing your investment earnings or withdrawing funds for qualified medical expenses, it's always tax free.

EASY SPENDING

You can easily move funds from your investment account back into your HSA spending account as often as you like.

FLEXIBLE ACCESS

After age 65, you can use your HSA funds for non-medical expenses without paying a penalty.

Investment options to fit your unique needs

Your HSA investment experience was designed for ultimate flexibility. Once you create an investment account, you'll have three investment account types to choose from: Managed, Self-Directed and Brokerage.

To ensure your investment experience is always aligned with your unique needs, you have the option to switch from one investment account type to another, no matter where you are in your investment journey.

MANAGED

Designed for **novice** investors who prefer to use an automated tool to select and manage their investments on an ongoing basis in accordance with their age, risk profile and time horizon. This account type delivers a "hands-off" "set it and forget it" approach to investing.

SELF-DIRECTED

Designed for **intermediate** investors who have the desire to self-select from a menu of monitored investment options covering multiple asset classes to diversify their portfolio, and then rebalance their portfolio manually. This account type provides a balance between structure, control and time requirements.

BROKERAGE

Designed for **expert** investors who desire to perform advanced research and trading across thousands of available investment instruments. This account type offers a hands-on, DIY approach to investing.

*Fidelity. (2021, May 6). How to plan for rising health care costs. www.fidelity.com/viewpoints/retirement/finance/how-to-plan-for-rising-health-care-costs

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Landing Page – Not Eligible Yet

Investments

Hi RIAtest, welcome to your HSA investment experience!

There's no doubt your HSA is a great way to pay for your retirement eligible medical expenses, but did you know it can also be used as a long-term investment vehicle? By investing your HSA, you give your money a chance to grow, maximizing opportunities to boost your savings and prepare for the future, including retirement.

Opening an investment account is simple. Once your HSA balance reaches \$1,001.00, you may choose to invest any HSA cash balances above this threshold.

Your current balance is \$3.00. Keep saving and once your balance exceeds \$1,001.00, we'll let you know you're eligible to invest.

Accelerate your retirement savings by investing your HSA.

Your HSA is undeniably a great tool to help you pay for current and future healthcare expenses, but it's also a powerful investment vehicle.

RETIREMENT READINESS

According to a recent study, the average retired couple age 65 will need approximately \$200,000 saved (after tax) to cover healthcare expenses in retirement.*

TAX FREE

Whether you're growing your investment earnings or withdrawing funds for qualified medical expenses, it's always tax free.

EASY SPENDING

You can easily move funds from your investment account back into your HSA spending account as often as you like.

FLEXIBLE ACCESS

After age 65, you can use your HSA funds for non-medical expenses without paying a penalty.

Investment options to fit your unique needs

Your HSA investment experience was designed for ultimate flexibility. Once you create an investment account, you'll have three investment account types to choose from: Managed, Self-Directed and Brokerage.

To ensure your investment experience is always aligned with your unique needs, you have the option to switch from one investment account type to another, no matter where you are in your investment journey.

MANAGED

Designed for novice investors who prefer to use an automated tool to select and manage their investments on an ongoing basis in accordance with their age, risk profile and time horizon. This account type delivers a hands-off "set it and forget it" approach to investing.

SELF-DIRECTED

Designed for intermediate investors who have the desire to self-select from a menu of monitored investment options covering multiple asset classes to diversify their portfolio and then rebalances their portfolio manually. This account type provides a balance between structure, control and time requirements.

BROKERAGE

Designed for expert investors who desire to perform advanced research and trading across thousands of available investment instruments. This account type offers a hands-on, DIY approach to investing.

*Fidelity, 2011. See [How to plan for rising health care costs](#). www.fidelity.com/resources/personal-finance/blog/rising-health-care-costs

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PTA 10P

One-Time Transfer

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Hi, Set Directed Thirteen

Transfer Funds

Move money to and from your investment account.

Enter the amount you would like to transfer.

\$ 50.00

Would you like to transfer your entire investment balance?

From

WealthCare Saver HSA - WCSHSA
\$2,794.49

→

To

Investment Account
\$500.06

REVIEW

[Close Investment Account](#)

Self-Directed Fund Allocation

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Investments

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HSA ACCOUNT

Fund Distribution

Amount Investing: \$2,319.12

Total Allocated: 0%

The investment portfolio below has been curated for you to invest in. Use the resource links to find out more about each instrument. Once you decide which instruments you want to invest in, you can allocate your investment dollars across your selection(s). You must invest in at least one instrument, but you do not need to invest in all of them. Your total allocation must equal 100%.

Fund/Ticker	Resource Link	YTD Return	1 YR Return	5 YR Return	10 YR Return	Select Election%	\$ Amount
Short-Term Bond ETF Vanguard BSV	🔗	0	-6.5	-3.84	-5.34	0 %	\$0.00
Core US Aggregate Bond iShares AGG	🔗	0	-11.78	-7.27	-8.63	0 %	\$0.00
Value ETF Vanguard VTV	🔗	0	-3.63	36.89	135.96	0 %	\$0.00
Vanguard Short-Term Government Bond ETF VVSH	🔗	0	-4.15	-3.1	-3.32	0 %	\$0.00
Orion® ETF Vanguard VOD	🔗	0	-23.36	76.79	208.41	0 %	\$0.00
Total International Bond Index Vanguard BNDX	🔗	0	-13.12	-8.80	0	0 %	\$0.00
FTSE Developed Market Index ETF Vanguard VEA	🔗	0	-21.21	-9.96	29.39	0 %	\$0.00
Core S&P 500 iShares ETF IVV	🔗	0	-11.71	56.24	177.65	0 %	\$0.00
Total World Stock Vanguard ETF VT	🔗	0	-17.83	26.69	87.02	0 %	\$0.00
Vanguard Extended Market ETF VXF	🔗	0	-30.72	28.31	132.95	0 %	\$0.00
Vanguard Total World Bond ETF BNDW	🔗	0	-12.4	0	0	0 %	\$0.00
U.S. Total Stock Market Index Vanguard VTI	🔗	0	-15.25	51.9	171.01	0 %	\$0.00
Emerging Markets Stock Idx ETF Vanguard VWO	🔗	0	-23.73	2.82	4.3	0 %	\$0.00
Core MSCI Total Intl Bk iShares ETF IUS	🔗	0	-22.67	-0.41	0	0 %	\$0.00

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Total Allocated: 0%
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Trade Review

Below is your proposed portfolio allocations. If you want to make changes, you can go back and adjust your allocations accordingly. If you're satisfied with the allocations below, click the Invest button to complete the trades. You can rebalance your portfolio using the Reallocate Funds link under the Move Money menu item at anytime.

Name	Ticker	Resource Link	1 YR Return	Election %	\$ Amount
Short-Term Bond ETF Vanguard	BSV	🔗	-6.5	20%	\$463.82
Core US Aggregate Bond iShares	AGG	🔗	-11.78	50%	\$1,189.56
Value ETF Vanguard	VTV	🔗	-3.63	20%	\$463.82
Vanguard Short-Term Government Bond ETF	VVSH	🔗	-4.15	10%	\$231.91

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Total Amount Investing: \$2,319.12
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Self-Directed Allocations

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Reallocate Funds Amount Invested: **\$497.87** Total Allocated: **100%**

Your allocations can be updated below. Use the resource links to find out more about each instrument. Once you decide which instruments you want to invest in, you can allocate your investment dollars across your selection(s). You must invest in at least one instrument, but you do not need to invest in all of them. Your total allocation must equal 100%.

Fund/Ticker	Resource Link	YTD Return	1 YR Return	5 YR Return	Current Election%	Select Election%	\$ Amount
Short-Term Bond ETF Vanguard BSV	Resource Link	0	-5.23	-2.22	100%	- 20 % +	\$99.57
Core US Aggregate Bond iShares AGG	Resource Link	0	-5.87	-1.18	0%	- 20 % +	\$99.57
Value ETF Vanguard VTV	Resource Link	0	11.84	34.44	0%	0 %	\$0.00
Vanguard Short-Term Government Bond ETF VGSHT	Resource Link	0	-3.72	-2.48	0%	0 %	\$0.00
Growth ETF Vanguard VUG	Resource Link	0	13.49	136.4	0%	0 %	\$0.00
Total International Bond Index Vanguard BNDX	Resource Link	0	-8.16	-3.18	0%	0 %	\$0.00
FTSE Developed Market Index ETF Vanguard VEA	Resource Link	0	-2.47	22.08	0%	- 30 % +	\$149.36
Core S&P 500 iShares ETF IVV	Resource Link	0	14.45	91.05	0%	0 %	\$0.00
Total World Stock Vanguard ETF VT	Resource Link	0	4.29	54.89	0%	0 %	\$0.00
Vanguard Extended Market ETF VXF	Resource Link	0	-5.08	65.92	0%	- 20 % +	\$99.57
Vanguard Total World Bond ETF BNDW	Resource Link	0	-8.92	0	0%	0 %	\$0.00
U.S. Total Stock Market Index Vanguard VTI	Resource Link	0	10.9	87.54	0%	- 10 % +	\$49.79
Emerging Markets Stock Idx ETF Vanguard VWOW	Resource Link	0	-10.9	15.37	0%	0 %	\$0.00
Core MSCI Total Intl Stk iShares ETF IXUS	Resource Link	0	-5.31	21.01	0%	0 %	\$0.00

Note: Realignment requests entered prior to market close will be effective the same market day. Realignment requests made after the market close will be effective the next market day.

Total Allocated: **100%** **CONFIRM**

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Sell Investments

Investments

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Notifications

HSA ACCOUNT

Apple, Inc.

AAPL

Price **\$165.70**

Your Market Value **\$98.09**

\$165.70

+\$1.10

Apr. 19, 2022 @ 9:06AM

Your Investment

Market Value	\$98.09	Cost/Share	\$168.94
Today's Return	\$0.38 (0.39%)	Shares	0.59
Total Return	-\$1.91	Portfolio Diversity	100%

About

Apple Inc. designs, manufactures and markets smartphones, personal computers, tablets, wearables and accessories, and sells a variety of related services. The Company's products include iPhone, Mac, iPad, and Wearables, Home and Accessories. iPhone is the Company's line of smartphones base... [Read more](#)

Market Cap	Price-Earnings Ratio	Dividend Yield	Resource Link
2.7T	28.29	0.52	🔗

HSA Dollars Available to Invest

\$2,882.70

Sell AAPL

Invest In Dollars

Est.Amount \$ **98.09**

Quantity 0.59 shares

Do you want to sell your entire position?

You are placing a good for day market order to sell **\$98.09** of AAPL based on the current market price of **\$165.70**. You will sell approximately 0.59 shares. Your order will be executed at the best available price.

SELL

EDIT

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