Personal Performance Home Page

- View account summary & balance information
- View allocation by mutual fund
- Filter historical return data by mutual fund and/or time period

Account Summary Tab

- Account Profile – General account information including the name and email address associated with the account.
- Investment Summary – View of balances, allocation percentages and future investment election percentages for new money deposited into the investment account by mutual fund. The icons provide access to each mutual fund's prospectus and Morningstar® fact sheet.
- My Performance – View an investment account summary including the balance, rates of return, and allocation by mutual fund. Can be filtered by mutual fund and/or time period.
- Change User ID – Create an alternate User ID of any combination of letters and numbers between 5-30 characters.
- Change Password – Complete the form to change your password, changes are effective immediately.
- Secret Question and Answer – If you forget your password, you can gain access by answering your secret question.

Manage Investments Tab

- Set Future Investment Elections – Elect how future dollar contributions are allocated amongst mutual funds within the investment account.
- Realign HSA Investments – Realign the existing money within the investment account between mutual funds by percentages.
- Transfer Between Investments – Move between mutual fund holdings, by dollar amount, dollar to percent, or percent to percent.

Move Money Tab

- Transfer Back to Base Account – Move money from the investment account to the HSA base balance. Money will be liquidated on a pro-rata basis according to the current alignment of the investment account holdings.

Planning Tools Tab

- Fund Performance Dashboard – View the Fund Performance Dashboard, which provides historical mutual fund return and fee information for the investment options available through the investment account. Links are also provided to mutual fund resources like the prospectus, fact sheet, and Morningstar® page.
- HSA Asset Allocation Tool – A calculator that generates a possible asset allocation based upon the age, objectives, risk tolerance, financial outlook, and health assessment entered by the investor.
- HSA Balance Projection Tool – A tool that projects the value of the investment account over time based on the current balance, annual contribution amount, annual rate of return, and years of investment entered by the user.
- Market Cycles – Provides historical data on the best to worst performing asset classes by year.

Statements and Activity Tab

- Quarterly Statement – View and/or print an electronic quarterly investment account statement.
- Statement on Demand – View and/or print an electronic investment account statement for a custom date range specified by the user.
- Pending Activity – View pending buy or sell orders initiated through the investment portal.
- Transaction History – View investment account transaction history by date range.

Help

- Frequently Asked Questions – Find answers to some of the most frequently asked questions about the HSA investment account.
- User Guide – A quick overview of the investment account portal and various functionality.
- Portal Video Tutorials – Learn how to navigate the investment portal.

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Your Indiana Credit Union