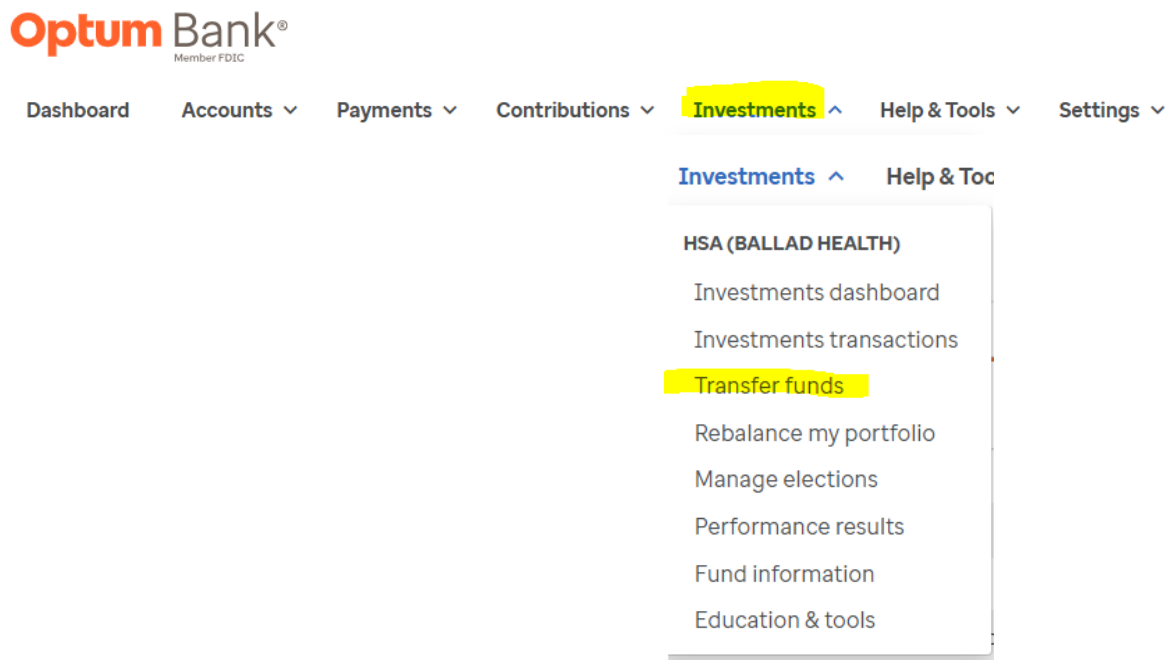
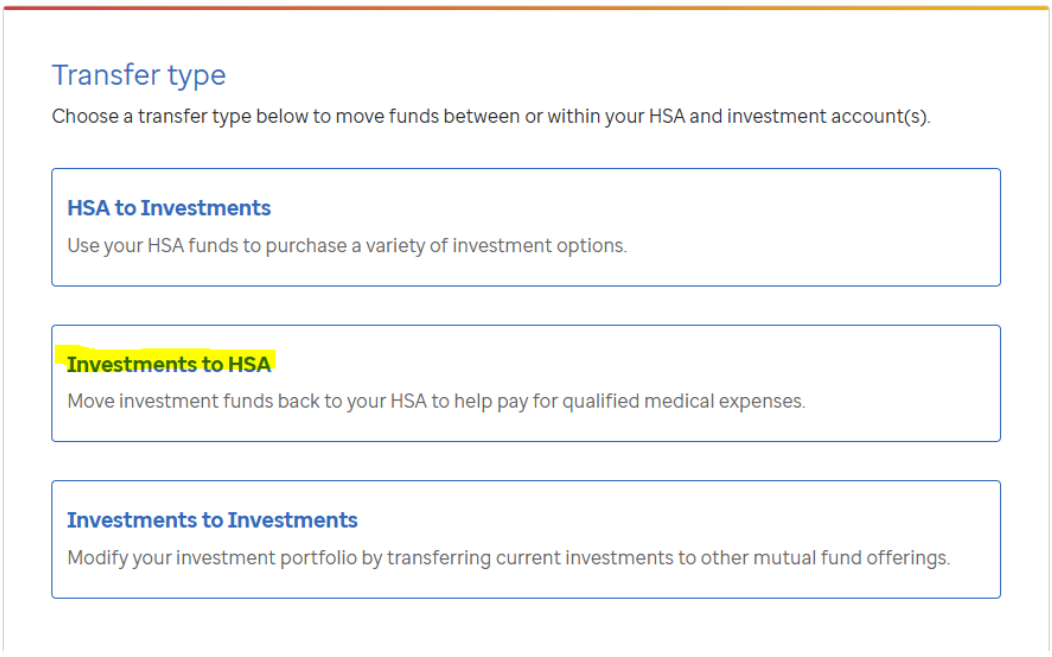
INSTRUCTIONS TO LIQUIDATE INVESTMENT ACCOUNT

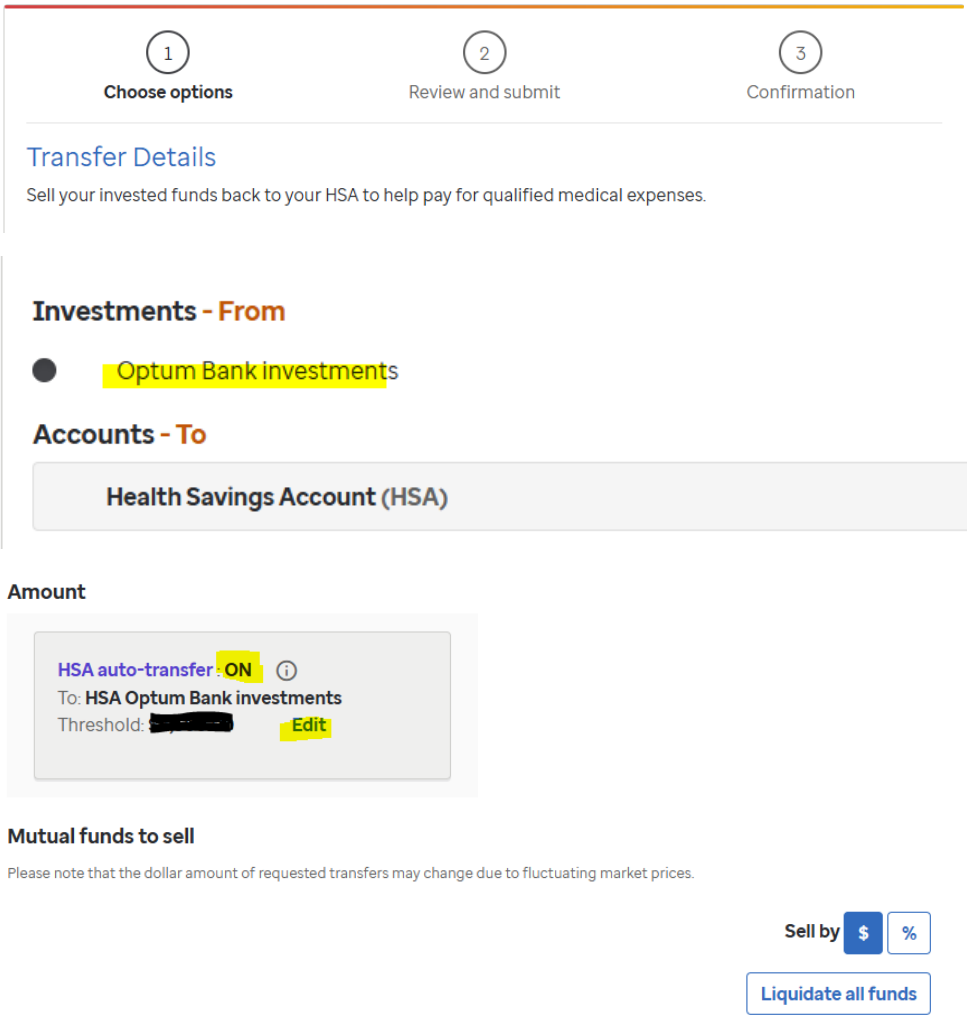
1. After logging in to your account through the Optum Bank portal (optumbank.com), click on Investments then transfer funds.



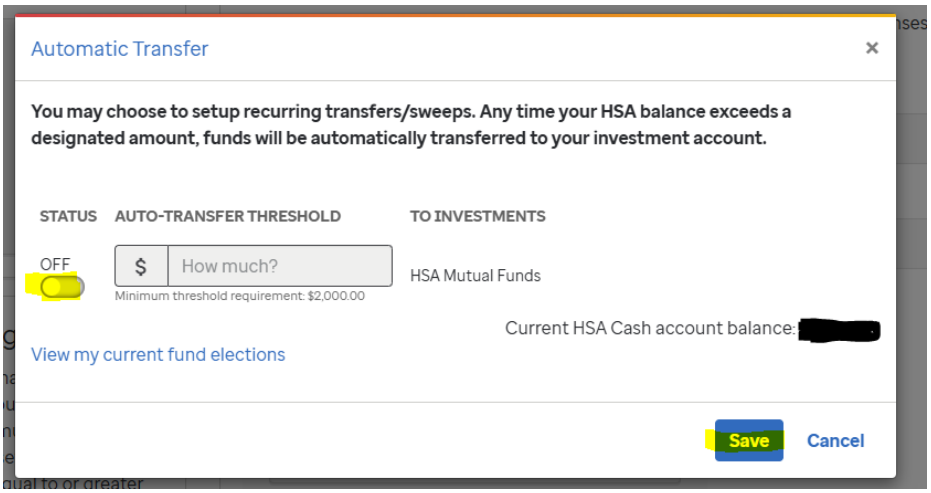
2. Choose the type of transfer – Investments to HSA



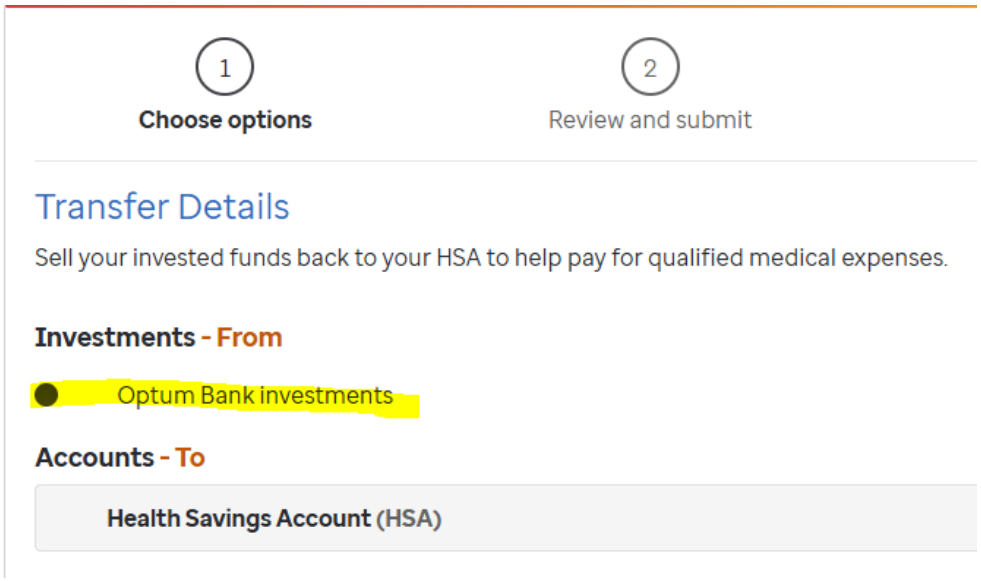
3. Click on Optum Bank Investments. If the HSA auto-transfer is ON, you will need to edit and turn to OFF to prevent additional deposits being made to your investment account. If this is already set to OFF, go to step 5.



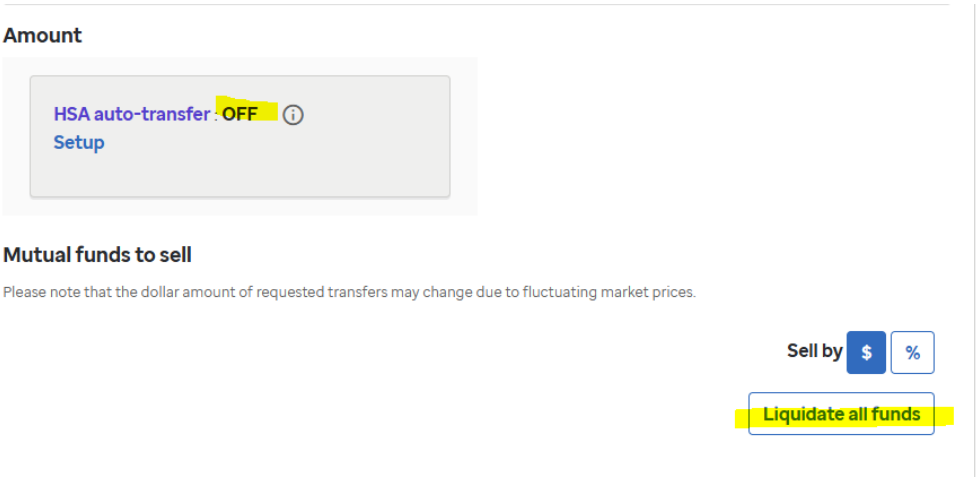
Turn off auto-transfer and save.



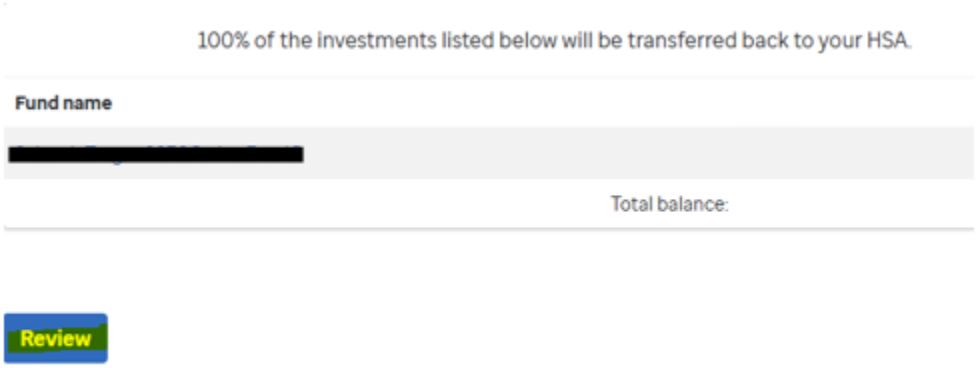
4. When you turn off the auto-transfer you will need to click again on Optum Bank Investments. The auto-transfer should now say OFF.



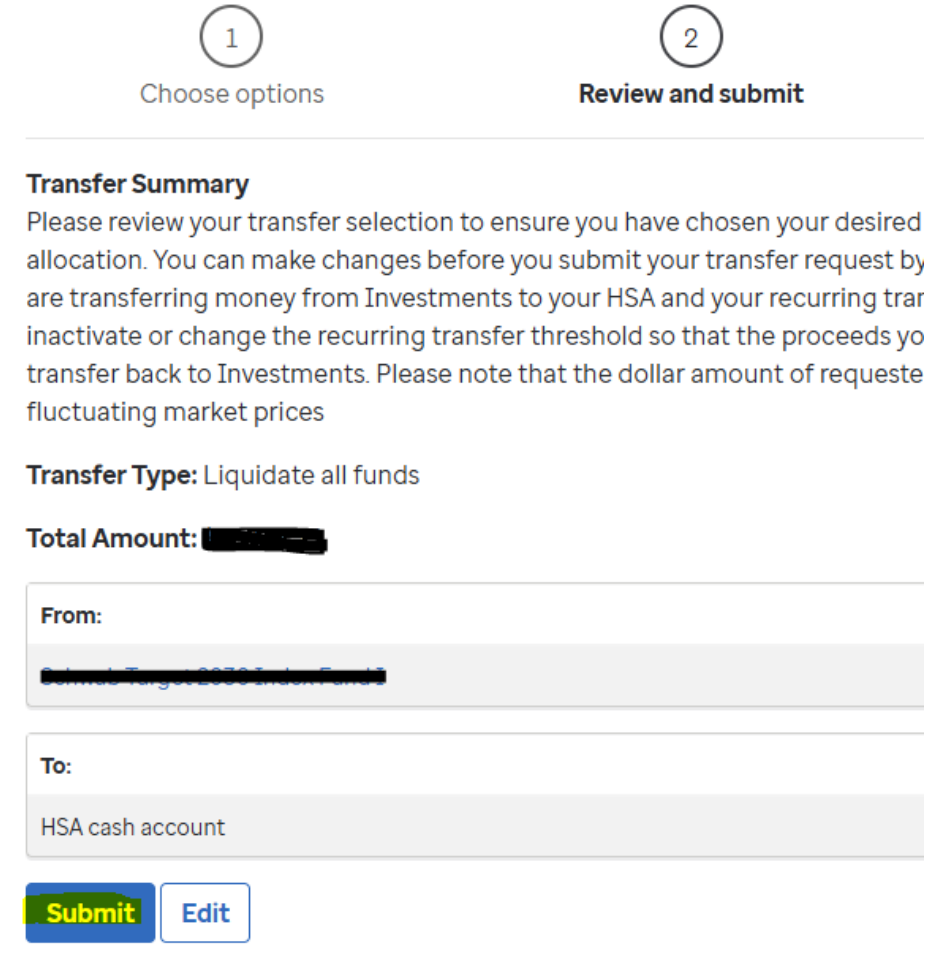
5. If the HSA auto transfer is OFF, you are ready to liquidate all funds. Click on Liquidate all funds.



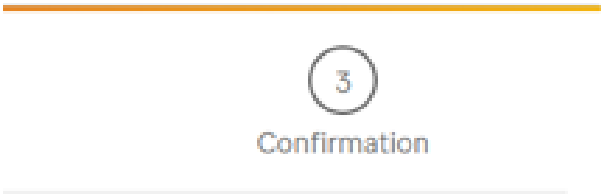
6. After you click on liquidate all funds, you are ready to review the transfer – click review.



7. After you review the summary, click SUBMIT when you are ready.



8. The final step is the confirmation. You should print for your records.



Any questions or if you have difficulty completing the process, please reach out to Optum Bank for assistance.

Online: Sign in to access self-help tools and assistance. Live Chat option

Phone: Customer support center is available for assistance 24/7, at (866) 234-8913.

Email: customercare@optum.com