

Introduction

FlexHSA offers a self-directed trading platform to invest your HSA funds. Investments are available through Millennium Trust Company and include a wide range of securities:

- Mutual Funds (including No-Transaction-Fee Funds)
- Publicly-Traded Stocks
- Exchange-Traded Funds
- Bonds
- Certificates of Deposits

Self Directed Trading with Ease

Portfolio Online provides online access to your investment account 24/7. Portfolio Online includes a self-directed investment platform that enables you to trade various securities, monitor positions and follow securities you wish to track-at-a-glance.

Online Trading Tools

You can trade mutual funds and stocks online through Portfolio Online during standard trading hours or after hours with next business day execution. With a few clicks, you can buy or sell securities and view the status of the trade.

Watch your Investments

Looking to make a change in your account? Portfolio Online allows you to create a Watchlist based on securities you want to track.

Single Point for All Investments

- ✕ Trade traditional investments such as mutual funds, stocks and ETFs
- ✕ View bonds, CDs and alternative investment holdings
- ✕ Enter trades online and then track and monitor your entire portfolio
- ✕ Watch securities of interest through the Security Watchlist or streaming real-time quotes
- ✕ Utilize Morningstar® Investment Tools for researching mutual funds

Morningstar® Internet Tools

These tools provide account holders with a comprehensive set of mutual fund analysis tools and content.

- **Investment Profile™**—Get a quick profile of each fund's ratings, risks and performance, including Top 10 holdings and more.
- **Mutual Fund Screener**—Navigate through the any mutual fund options available.



Millennium Trust Company

Account:

Holdings View:

Show Asset Category Type:

ASDAQ COMPOSITE 1,973.44 +47.06 +2.44% (NYA) NYSE COMPOSITE INDEX 6,305.69 +154.29 +2.51% As of

Portfolio Activity Reports Trading Tools Links

[Account Allocation](#) [Holdings](#) [Period Comparison](#)

Holdings - Market View		Trade Date Position View	
Security/Description	Quantity	Cost	Price
Mutual Funds			
Equity Mutual Funds			
VIGRX VANGUARD GROWTH INDEX FD	5.064	\$155.04	\$23.32
Total Equity Mutual Funds		\$155.04	
Total Mutual Funds		\$155.04	

ACCOUNT MANAGEMENT TOOLS - VIEW YOUR HSA HOLDINGS IN ONE PLACE!




Customize Your View

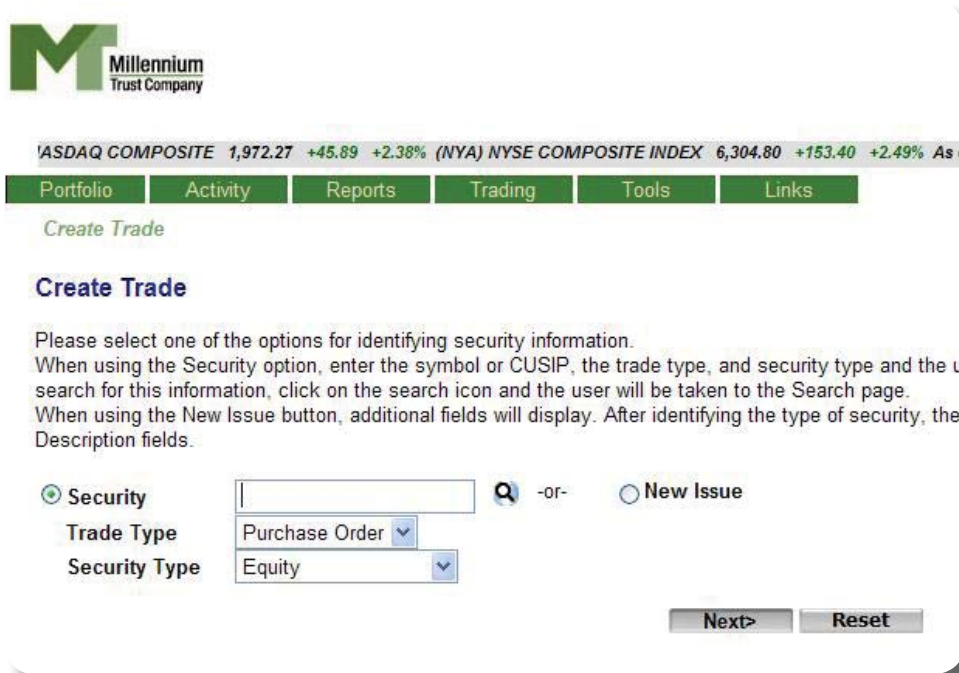
Portfolio Online allows you to quickly look at your account balances or review detailed account activity in real-time. You can also compare the performance of your portfolio over varying time periods.

Detailed Portfolio Holdings

Easily view the detailed holdings of your portfolio at anytime. Each security position shows the number of shares you own, the purchase cost, current price and current market value.

Easy Account Management Tools

-  Customize your portfolio holdings view
-  View in-depth activity in your account
-  Select performance comparisons for various time periods



Millennium Trust Company is an independent Trust Company and serves as a custodian for the investments in your FlexHSA. Millennium Trust Company performs the duties of a custodian and, as such, does not provide investment advice or sell investments, nor offer any legal or tax advice. Please be careful when entering trades in Portfolio Online. Millennium Trust is not responsible for errors made for entering trades; or for the unavailability of Portfolio Online.

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