Navia Benefit Solutions delivers a modern and personalized HSA investment solution to your employees

A next-generation investment experience

Navia Benefit Solutions delivers a new and modern approach to HSA investing that allows your employees to personalize their investment journey to fit their unique needs and experience level. With the WealthCare Saver investment solution, your employees can choose from three different investment models – Managed, Self-Directed and a first-of-its-kind Brokerage option – all of which are designed to help them work toward their long-term investing goals. Best of all, it's fully integrated with the Navia Benefit Solutions HSA solution, which means your employees can manage all aspects of their HSA, including their investments, from a single portal.

Three different models ensure a personalized approach to investing

Managed: 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.

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 do-it-for-me and DIY approaches to investing.

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

Key benefits

- Deliver a unique HSA experience that supports your employees through all stages of healthcare transactions – spending, saving and investing.
- Provide your employees with an integrated, modern HSA investment solution that not only helps them understand the value of investing but also helps them work toward their long-term investing goals.
- Whether your employees are new to investing and seeking a guided experience or seasoned investors looking to research and trade stocks and ETFs available on the platform, you can offer them an investment journey that is aligned with their individual needs.
- HSA investment accounts are opened in real time, transactions are made in real time and account data is viewed in real time, which means your employees have full transparency into their assets and allocations.