

Next Steps with your Health Savings Account (HSA)

Congratulations! By opening a HSA from HSA Bank, you're now on your way to spending less on health care...saving more in taxes... and building savings for the future!

We want you to get the most out of your health savings account and we start by giving you all the tools you need to access, grow and manage your HSA.

Welcome Kit. This valuable "starter package" contains your account number, important disclosures and a privacy statement. If you signed up using our individual online system, you will immediately receive an electronic welcome kit by email. If you enrolled through the group online system, submitted a paper application or enrolled through your employer, you will receive a welcome kit in the mail 5 to 10 days after your application has been processed.

Debit cards. Arrives separately from your Welcome Kit within 5 to 10 working days and is delivered in a plain, blank envelope for security reasons. To activate, simply call the toll-free number on the card. You will select your Personal Identification Number (PIN) during the card activation process.

How to Use your HSA Debit Card

- There is no charge when you use your card as a credit transaction.
- At the point of sale: To process a transaction as a credit, use your signature instead of PIN (no charge). To process as a debit, enter your PIN number (\$2.00 per transaction).
- To withdraw funds at ATM: Select checking as type of account and enter your PIN. (\$2.00 per transaction.)
- Learn more at www.hsabank.com/DebitCard

Checks. If you ordered checks, you will receive them in 5 to 10 business days. There will be 50 duplicate checks and 10 deposit slips with your order.

Internet Banking. Gives you 24/7 access to up-to-the-minute account activity and balance information, electronic statements, tax documents, email notifications and electronic fund transfers. Sign up at www.hsabank.com/ibanking

Authorized Signer Form. Lets you authorize someone you want to have access your HSA funds and information. Form is available at www.hsabank.com/forms.

Beneficiary Designation Form. Lets you designate a beneficiary for your HSA. Available at www.hsabank.com/forms.

If you provided an email address when enrolling, you will receive an email confirmation of the account opening.

For assistance, please contact Client Assistance Center

- 📞 (800) 357-6246 Monday – Friday, 7 a.m. – 9 p.m., CT
- 🌐 www.hsabank.com
- ✉ 605 N. 8th Street, Ste. 320, Sheboygan, WI 53081

