



OPTUM Bank®

Member FDIC

HSA ROLLOVER

Want to roll over an HSA? We make it easy.

If you've recently changed jobs or just want to consolidate your accounts, transferring your health savings account (HSA) from your former job to Optum is easy with our **online inbound rollover** feature. There are no paper forms to fill out, and you don't have to wait weeks or even months for your money to roll over.

Follow these easy steps:

1. Visit **optumbank.com**, log in to your account and select "Rollover funds to your HSA" under the "Self Service" section.
2. Enter the account number of the HSA you wish to transfer and the amount to be transferred.

Your funds will be available in your Optum Bank HSA within three to five business days. When they're ready, we'll send you an email confirming that your funds are available, and then you can close your old account.

In order to make a contribution to your HSA, you must be enrolled in a qualifying high-deductible health plan (HDHP) and meet the other requirements defined by the IRS.

Health savings accounts (HSAs) are individual accounts offered or administered by Optum Bank®, Member FDIC, and are subject to eligibility and restrictions, including but not limited to restrictions on distributions for qualified medical expenses set forth in section 213(d) of the Internal Revenue Code. Fees may reduce earnings on account. State taxes may apply. This communication is not intended as legal or tax advice.

Please contact a competent legal or tax professional for personal advice on eligibility, tax treatment, and restrictions. Federal and state laws and regulations are subject to change.

Have questions?

Visit **optumbank.com** to explore the tools and resources available to you, or give us a call at the phone number of the back of your health savings account Debit MasterCard®.



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