

Multiple HSAs? Let's make this easy.



Already have a health savings account (HSA) with another HSA provider? Consolidate your funds into one account with Optum Financial. It can save you time and make managing your health care finances easier.

Here's how to get started:

**Step
1**

Open an Optum Financial HSA.

If you're opening an Optum Financial HSA as part of your employee benefits package, please contact your employer for enrollment instructions. If you're not affiliated with an employer, please visit optumfinancial.com to enroll. The process takes about 10 minutes. You must be enrolled in a qualifying high-deductible health plan to open an HSA.

**Step
2**

Download the HSA transfer form.

Once your Optum Financial HSA is opened, you can download and complete the HSA transfer form [here](#).

**Step
3**

Mail your HSA transfer form.

Send your completed form to your current HSA administrator. (Do not send it to Optum Financial.)

**Step
4**

Your transfer will be processed.

Your current HSA administrator will process your transfer request and send you your funds, usually within 3-6 weeks.

**Questions?
Visit optumfinancial.com.**

Health savings accounts (HSAs) are individual accounts offered through Optum Bank®, Member FDIC, or ConnectYourCare, LLC, an IRS-Designated Non-Bank Custodian of HSAs, each a subsidiary of Optum Financial, Inc. Neither Optum Financial, Inc. nor ConnectYourCare, LLC is a bank or an FDIC-insured institution.

HSAs are subject to eligibility requirements and restrictions on deposits and withdrawals to avoid IRS penalties. State taxes may apply. Fees may reduce earnings on account. This communication is not intended as legal or tax advice. Federal and state laws and regulations are subject to change.

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