

How-To Transfer Your HSA Balance if you don't have any auto payments or investments.

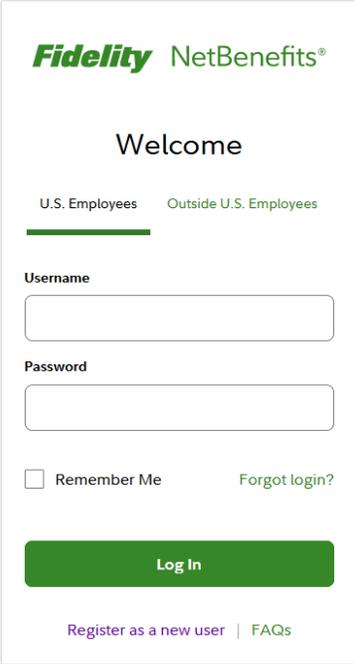
Step 1: Log Into Your Previous Employer's HSA online

Step 2: Download a copy of your most recent account statement

Step 3 : Write down your Account Number. You will need to enter this manually later

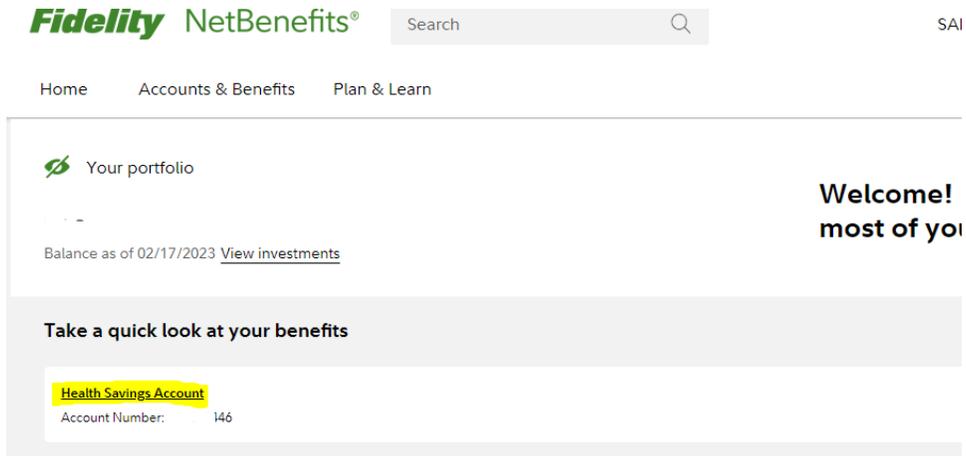
Step 4: Log into the Fidelity HSA Website

www.netbenefits.com



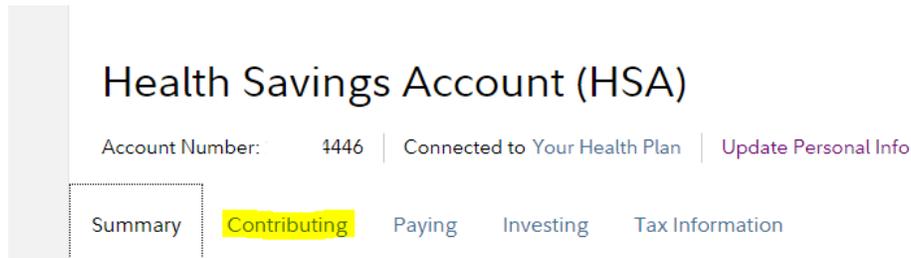
The screenshot shows the Fidelity NetBenefits login page. At the top, the Fidelity logo is in green, followed by "NetBenefits®". Below this is the word "Welcome" in a large, black, sans-serif font. Underneath "Welcome" are two links: "U.S. Employees" and "Outside U.S. Employees". The "U.S. Employees" link is underlined with a green line. Below these links are two input fields: "Username" and "Password", each with a corresponding text box. To the left of the "Remember Me" checkbox is a small square box, and to the right of the "Forgot login?" link is a small square box. At the bottom of the form is a green "Log In" button. Below the button are two links: "Register as a new user" and "FAQs".

Step 5: Click on “Health Savings Account”



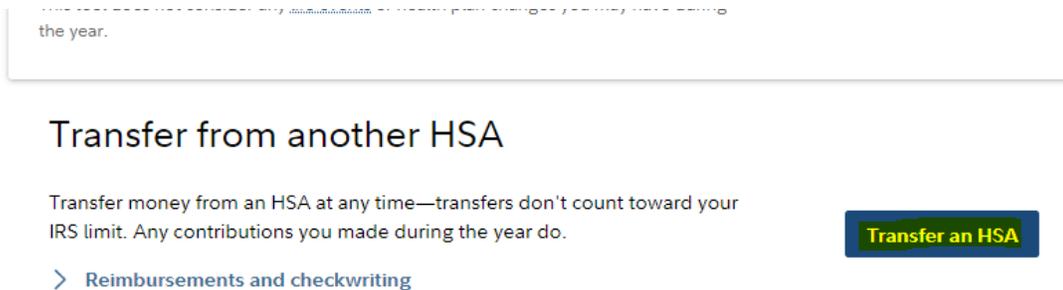
The screenshot shows the Fidelity NetBenefits® website. At the top, there is a search bar and the user's name "SAI". Below the navigation bar (Home, Accounts & Benefits, Plan & Learn), there is a "Your portfolio" section with a balance as of 02/17/2023 and a "View investments" link. A "Welcome! most of you" message is on the right. Below this is a "Take a quick look at your benefits" section. Underneath, the "Health Savings Account" is highlighted in yellow, with the account number "146" displayed below it.

Step 6: Click the “Contributing” Link



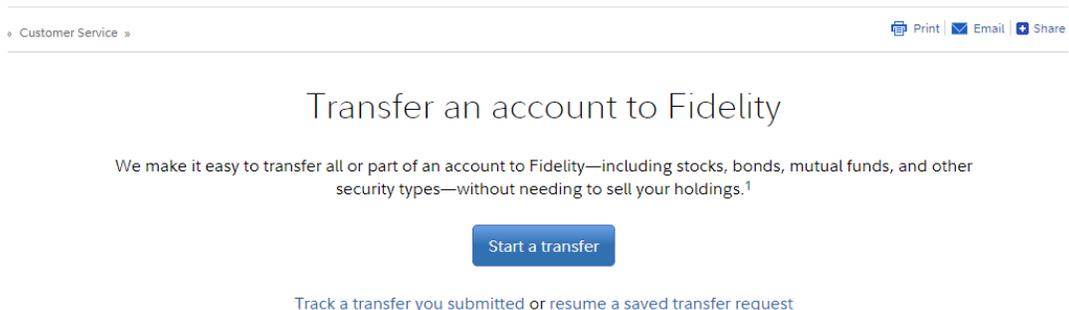
The screenshot shows the "Health Savings Account (HSA)" page. The account number "4446" is displayed, along with links for "Connected to Your Health Plan" and "Update Personal Info". Below the account information, there is a navigation menu with tabs: "Summary", "Contributing" (highlighted in yellow), "Paying", "Investing", and "Tax Information".

Step 7: Scroll Down and Click the “Transfer an HSA” button.



The screenshot shows the "Transfer from another HSA" section. It includes the text: "Transfer money from an HSA at any time—transfers don't count toward your IRS limit. Any contributions you made during the year do." Below this text is a blue button labeled "Transfer an HSA" which is highlighted in yellow. There is also a link for "Reimbursements and checkwriting".

Step 8: Click “Start a transfer” button.



The screenshot shows the "Transfer an account to Fidelity" page. At the top, there is a "Customer Service" link and "Print", "Email", and "Share" options. The main heading is "Transfer an account to Fidelity". Below it, the text reads: "We make it easy to transfer all or part of an account to Fidelity—including stocks, bonds, mutual funds, and other security types—without needing to sell your holdings.¹" At the bottom, there is a blue button labeled "Start a transfer" which is highlighted in yellow.

Track a transfer you submitted or resume a saved transfer request

Step 9: Type the name of your previous employer's HSA in the search field.

Tell us where you're moving your assets from

Select your current firm

Use your latest statement to get the information you need to complete this transfer.

You can either

Step 8: Click "Next"

✔ You've selected Health Equity - Hsa. Now, let's move on to the next step.

Next

Step 9: Enter the Account Number you wrote down earlier and select account type HSA.

Refer to your current firm's statement to complete the following.

Your firm Optum Bank - Hsa
Account number
Select your account type
Not sure which to choose?

Save

Step 10: Click "An existing account."

Next, decide where to transfer your assets

Are you moving assets into an existing account or would you like to open a new one?

Select one

Exit | Save

Step 11: Click “Next”

Select one An existing account Open a new account

Your compatible account Health Savings Account (46)

Step 12: Click “Yes” and then “Next”

You may choose to move specific positions from Optum Bank - Hsa.

Is this a full account transfer? Yes No

Note: Whole shares in a brokerage account will transfer in kind (i.e., without being sold transferred to Fidelity as cash. To avoid selling fractional shares, select “No” for “Is this screen enter the number of whole shares to transfer.

Save

Step 13: Attach the Account Statement you downloaded from Health Equity.

A recent statement from Optum Bank - Hsa is required to process your request.

Note: If you are transferring between accounts where the account owner names do not match exactly, you may need to submit additional documentation. [Learn more](#)

File name	File size
<input type="button" value="Attach file"/>	

Save

Step 14: After the file has been attached click “Next”

A recent statement from Optum Bank - Hsa is required to process your request.

Note: If you are transferring between accounts where the account owner names do not match exactly, you may need to submit additional documentation. [Learn more](#)

File name	File size
2023-01-31 HSA Statement.pdf	1.84 MB 

 Attach file Total file size: 1.84 MB

Exit | Save

Previous

Next

Step 15: After you have reviewed your transfer click “Next”

Confirm your transfer request

Your transfer details

Transfer from Optum Bank - Hsa
HSA 2

Transfer to Health Savings Account i4446)

Transfer type Full account

Attachments  2023-01-31 HSA Statement.pdf
1.84 MB

Exit | Save

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Step 16: Click the “Tap or click to sign” button.

By signing below, you agree you have read and consent
Conditions.

[⊕ View the Transfer of Assets Terms and Conditions](#)

signature

 Tap or click to sign

Exit | Save

Previous

Submit

Step 17: Use your mouse to sign, then click “Accept signature”



Step 18: Click “Submit”

By signing below, you agree you have read and consent
Conditions.

[⊕ View the Transfer of Assets Terms and Conditions](#)

signature



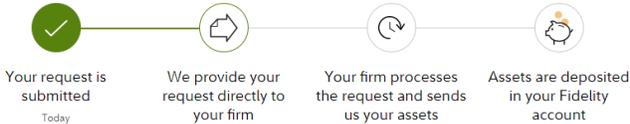
Exit | Save

Previous

Submit

And You're Done!

Success! Estimated completion of transfer:



Details

Transfer from: Optum Bank - Hsa
HSA 6892

Transfer to: Health Savings Account 4446)

Transfer type: Full account

Estimated completion

Attachments



2023-01-31 HSA Statement.pdf
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