

Health Savings Account Transfer Your Existing HSA



Combine Your Accounts for Easier Balancing

If you have more than one HSA, pulling them together into one Chard Snyder HSA Advantage™ account makes sense. You will only need to manage one account and you will have a larger balance for investments. To start the process, you must confirm that your HSA Advantage account is open. Go to the Chard Snyder website and log in to your account. If there is money in the account, it is open.

Notify Both Banks of Your Decision

Contact Chard Snyder to request an HSA Advantage™ Transfer Request form. Complete and forward the form to the bank currently holding the funds. The original bank will write a check for the amount of your request (either all or a part of the account) and send it directly to Chard Snyder to be deposited. It may take up to 60 days to complete the entire process and make your funds available.

If the original bank chooses not to transfer your account, you must check with them for details.

Tax Documents

You will receive tax documents from each bank that has held HSA funds during the tax year.

Statements

You will receive an electronic notice that a statement of your account is available online, unless you do not provide an email address. You may request paper statements for a monthly fee.

Sign up for Text Alerts!

You can choose which text alerts you would like to receive for things like account summary, benefits card transactions, payment has been issued, and more!

Sign up for text alerts: On your Chard Snyder Mobile App, go to *Profile*, then *Notification Preferences*, or log in to your Chard Snyder online account and click on the *Message Center* tab. Under *Update Notification Preferences*, choose the *Text* boxes under *Alert Preferences*.



The Chard Snyder Mobile App




Manage your
HSA on the
go, anywhere,
anytime

Features

- View account balances and transaction details
- Request HSA transactions, including distributions and contributions
- Manage HSA investments to realign, update, or transfer your portfolio (*Options become available when minimum HSA cash balance set by your employer is reached.*)
- Enter your bank account for seamless transfers
- Scan any product for eligibility using your phone's camera

Download from the App Store or
Google Play



 www.chard-snyder.com