Easy HSA Transfer

What is the Easy HSA Transfer process?

Your employer has selected a new administrator for your HSA, which means a new and improved account experience is coming soon!

As part of the transition, you will need to consent to have your HSA funds moved to the new platform. The Easy HSA Transfer process allows you to provide consent online in just a few minutes – no paper forms required.

Here's how it works:

Step 1

Log in to your benefits website at **https://plansource.wealthcareportal.com/Page/Home**.

Step 2

Click the **Easy HSA Transfer banner** at the top of the page. You may be prompted to select your prior custodian from a drop-down menu.

Step 3

Select Health Savings Account (HSA) from the drop-down menu, then click 'Continue.'

Step 4

Take a moment to review the options and choose to either **consent or decline to transfer** your funds. If you would like to consent to transfer your funds, select the top option and click 'Submit.'

Step 5

You will be taken to the **confirmation page**. If desired, you may print this page for your records or click "continue" to return to your account homepage. That's it!

What happens next?

We do the rest of the work for you!

We'll capture your information, send it to your previous bank, and request that your **funds be transferred to your new account**.

Simply **look for funds to transfer** to your new account in 4-6 weeks.

Why transfer your HSA funds?

Wondering why you should take advantage of the Easy HSA Transfer process? Here are a few reasons:

Avoid Unnecessary Monthly Fees

If you do not transfer your funds, you may end up paying monthly administrative fees to keep your previous account open.

Simplify Account Management

Transferring your funds keeps your account in one place. One login, one debit card, one place to manage your spending and saving.

Maximize Investment Opportunity

Did you know you can invest your HSA funds once you reach the minimum balance of $1,000? By transferring your funds, you ensure the highest account balance and give yourself the greatest opportunity to invest in your future.

Take advantage of the Easy HSA Transfer process. Visit https://plansource.wealthcareportal.com/Page/Home to get started today.

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