

# HSA Advantage™

## Transfer Your Existing HSA

### Combine Your Accounts for Easier Balancing

If you have more than one HSA, pulling them together into one 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 into your account. If there is money in the account, it is open.

### Notify Both Banks of Your Decision

Contact Chard Snyder to request a *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 HSA Advantage 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 health savings account 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.

### Text Alerts



Receive text alerts about your account through your mobile phone. You can choose which text alerts you would like to receive for things like Benefit Card transactions, payment has been issued, available cash threshold, and more!

Sign Up for Text Alerts after you are logged into your Chard Snyder account online:

1. Go to the *Message Center* tab
2. Click on *Update Notification Preferences*
3. Enter or update your Mobile Number under Contact Information
4. Scroll down to view the *Statements & Notifications Options*
5. Check the appropriate boxes, under the Alert Preferences column, of how you wish to receive information for each item. You can choose email or text or both.
6. Click *Submit* to update your preferences

To disable an alert, uncheck the appropriate box. Click *Submit* to update your preferences.

## The Chard Snyder Mobile App

### Features

- View investment summary
- View account balances and transactions
- Request reimbursements
- Scan products for eligibility  
(Plan restrictions may apply)

Download from the App Store or Google Play



800.982.7715 [www.chard-snyder.com](http://www.chard-snyder.com)

