

Tap into your HSA — anytime, anywhere

**Online and mobile tools to help you
maximize your savings**



There are many online resources and tools to make it easy to manage your new HSA (health savings account):

Visit our website or use our mobile app

Sign in to your online account anywhere, anytime on either our website or mobile app to:

- Check balances
- Make deposits
- Pay medical bills
- Track payments
- Reimburse yourself
- Upload and store receipts
- Check monthly statements
- Manage investment activity

See qualified medical expenses easily

Use the searchable list at optum.com/qualifiedexpenses to see what you can buy.

Take the Health Savings Checkup

Answer a few questions about your health, your HSA activity and retirement goals, and receive a personalized snapshot of your potential health care expenses in retirement.

Manage your HSA

Find out your maximum contribution limit, calculate your yearly tax savings and see how much your HSA may grow over time with our HSA calculators.

Track your contributions

See how much you've contributed to your HSA year-to-date – and how much more could be contributed, according to your individual or family plan coverage.

Diversify your portfolio

If you choose to invest in mutual funds, answer a few questions to get help with fund selections using our asset allocation calculator.



Scan the QR code or visit
optum.com/SignIn to
sign in to your account

Investments are not a deposit, not FDIC insured, not bank issued or guaranteed by Optum Financial or its subsidiaries, including Optum Bank, and are subject to risk including fluctuations in value and the possible loss of the principal amount invested.



Health savings accounts (HSAs) are individual accounts held at Optum Bank®, Member FDIC, unless otherwise indicated, and administered by Optum Financial, Inc. or ConnectYourCare, LLC, an IRS-Designated Non-Bank Custodian of HSAs, 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 and/or local taxes may still apply. Fees may reduce earnings on account. Refer to your HSA account agreement for details.

This communication is not intended as legal or tax advice. Consult a legal or tax professional for advice on eligibility, tax treatment, and restrictions. Please contact your plan administrator with questions about enrollment or plan restrictions.

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