

## Individual Plan Sales Process for HealthEquity<sup>®</sup> Health Savings Accounts (HSAs)

1. Applicant selects HSA administration through HealthEquity in conjunction with an individual HealthSave<sup>SM</sup> plan.
2. Applicant completes the Individual Plans Application Form, including the HealthSave section.
  - Upon approval of the application, an HSA will be established with HealthEquity unless the applicant checks the “I choose to decline the HSA account with HealthEquity” box in the HealthSave Benefit Section of the application.
3. Upon approval of the application, SelectHealth sends enrollment information to HealthEquity.
4. HealthEquity sends Client Guides and debit cards to the subscriber.
  - These are sent within ten business days of HealthEquity receiving enrollment information from SelectHealth.
5. Subscriber completes the HSA Contribution Form (contained in the Client Guide) and submits the form to HealthEquity in order to contribute to the HSA.

**NOTE:** SelectHealth needs a Social Security number for applicants electing HSA administration; otherwise, HealthEquity can't establish the account.

**Fax completed forms to HealthEquity at 801-642-0505 or mail to the following address:**

**HealthEquity, Inc.  
Attn: Enrollment  
1276 South 820 East, Suite 201  
American Fork, UT 84003**

6. Broker should instruct any clients currently using MGIS for HSA administration about their options for their current HSA.
  - Existing MGIS subscribers may either keep their existing HSA active or close their account and transfer the funds to HealthEquity.
    - a. **Maintain Existing Account:** Clients who keep their account active will be required to pay the monthly administrative fee directly to their custodian—Mellon or Synovus—rather than MGIS (the monthly fee will be deducted from their account).
    - b. **Close Existing Account and Transfer Funds to HealthEquity:** Clients should contact their current custodian (i.e., Mellon, Synovus) for information on terminating their account. They may be able to close the account over the phone, or they may be required to complete and submit a transfer request form (Mellon and Synovus transfer forms are available through the Broker Exchange). The IRS has guidelines on the type and frequency of allowed transfers, and representatives from HealthEquity, Mellon, or Synovus should be able to assist with basic questions.

### Customer Service Phone Numbers

**HealthEquity: 866-346-5800**

**Mellon: 866-383-1043**

**Synovus: 877-367-4472**

### HealthEquity Account and Routing Numbers

**(For use with electronic funds transfers)**

**Account #: 0011094648**

**Routing #: 031101114**

7. No monthly HealthEquity HSA administration fees will be required.

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**For HealthEquity-specific questions, use either of the following resources:**

**Scott Rose**, *Director of Sales and Broker Support, HealthEquity:*  
Office: **801-642-0527**  
Cell: **801-360-4367**

HealthEquity Broker Hotline:  
**800-819-5852**