



Designate A Beneficiary For Your HSA

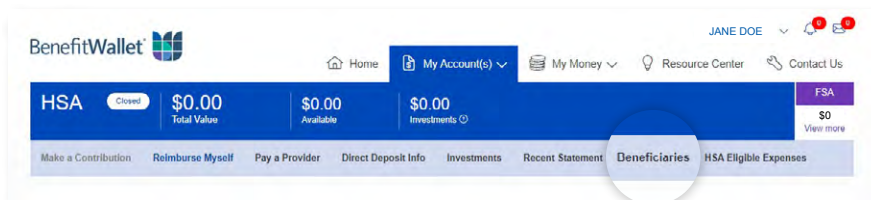
If you previously designated beneficiaries via the Master Signature Card and/or Beneficiary Change Form, please update your beneficiaries using this process.

It is important that you review your beneficiaries, so your assets are distributed as you intend in the event of your death. If beneficiary information is missing or the total allocations are less than 100%, payment may be delayed.

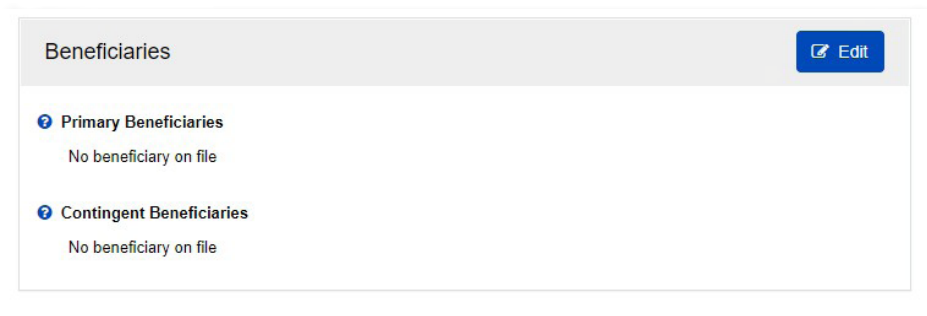
What You Need to Do:

Follow these steps to update your beneficiaries on **Benefits Online**:

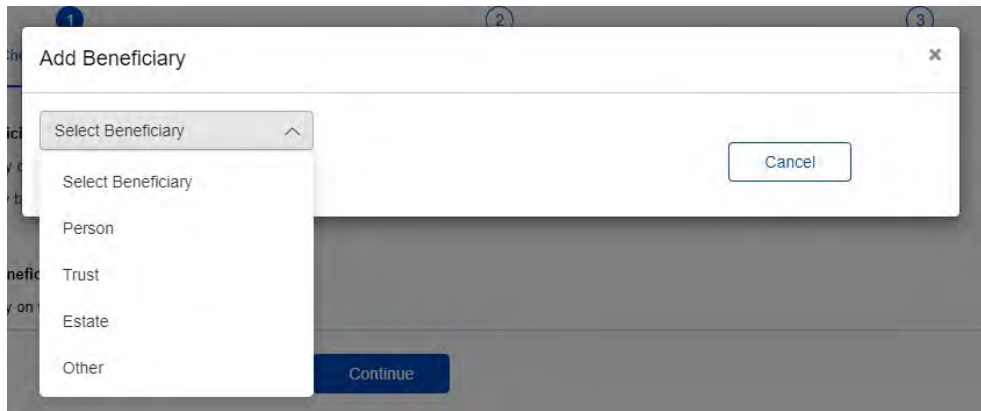
1. Log on to mybenefitwallet.com
2. Choose **Beneficiaries**



3. Select **Beneficiaries**
4. Choose **Edit**

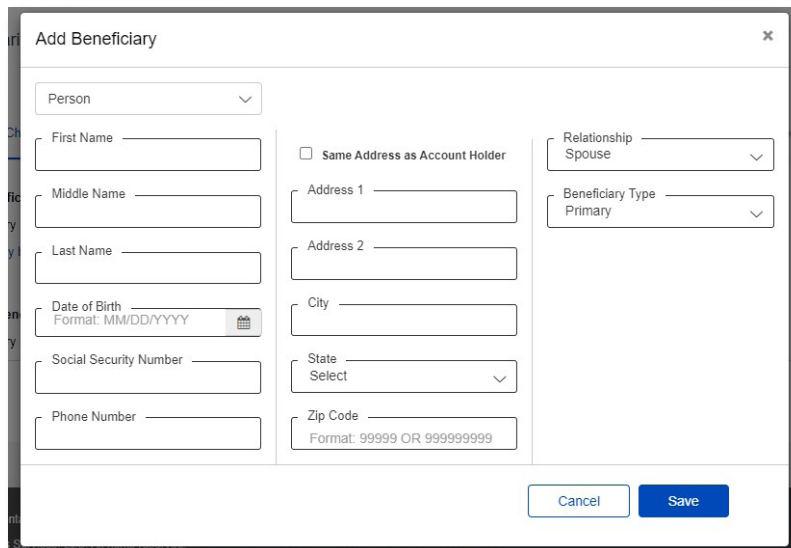


5. Choose the **Beneficiary Type**. Be aware that there are tax implications based on the type of beneficiary you choose. It is advisable to consult a tax professional prior to designating your beneficiary.



The screenshot shows a dialog box titled "Add Beneficiary" with a close button (X) in the top right corner. A dropdown menu labeled "Select Beneficiary" is open, displaying the following options: "Select Beneficiary", "Person", "Trust", "Estate", and "Other". A "Continue" button is located at the bottom center of the dialog box, and a "Cancel" button is located at the top right.

6. Enter the requested information about your beneficiary then choose **Save**.



The screenshot shows the "Add Beneficiary" dialog box with the following fields and options:

- Beneficiary Type: Person (selected)
- First Name: [Text Field]
- Middle Name: [Text Field]
- Last Name: [Text Field]
- Date of Birth: [Text Field] (Format: MM/DD/YYYY)
- Social Security Number: [Text Field]
- Phone Number: [Text Field]
- Same Address as Account Holder:
- Address 1: [Text Field]
- Address 2: [Text Field]
- City: [Text Field]
- State: [Dropdown Menu] (Select)
- Zip Code: [Text Field] (Format: 99999 OR 999999999)
- Relationship: [Dropdown Menu] (Spouse)
- Beneficiary Type: [Dropdown Menu] (Primary)

Buttons: "Cancel" and "Save" are located at the bottom right of the dialog box.

7. Add a Contingent Beneficiary using steps 4-6.

After updating your beneficiaries, submit any required paperwork (as applicable) per the online instructions and retain copies with your other important financial and estate documents.

Also, if you experience a life event or would otherwise like to change one or more of your beneficiaries, you may do so at anytime using this process. Be sure to update your beneficiary information in a timely manner to ensure your intended allocations are on record.

