

WHAT IS A HEALTH SAVINGS BROKERAGE ACCOUNT?



WHAT IS A HEALTH SAVINGS BROKERAGE ACCOUNT (HSBA)?

- Health Savings Brokerage Account (HSBA) is a self-directed brokerage account designed to complement a health savings account. HSBA provides greater access to thousands of additional investment choices.

Surency is offering a Health Savings Brokerage Account through Charles Schwab. You can open an account through your Surency HSA account and buy and sell investments through the Charles Schwab system.



ENROLLMENT

- Log into your Member Account at Surency.com to complete the online enrollment.
Once enrolled, you will receive a new Charles Schwab brokerage account number.
- Your account will automatically redirect you to Schwab.com. Once there, register as a New User.
- Within a few days of your enrollment, an HSBA Welcome Kit will be mailed to you.

HOW TO INVEST

- You can manage investment accounts under one of the two One-Time Transfer options.
- You will need to then realign your portfolio page: Fund to Fund transfer (Dollar to Dollar, Dollar to Percent and Percent to Percent).

Questions? Please contact Charles Schwab.

You can contact the Charles Schwab customer service team at 800-435-4000 or by filling out their online form at www.schwab.com/contact-us.

Surency.com