

# INTERNET BANKING i

## Log in to Your Account

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Not signed up for Internet Banking? [Click here.](#)

## Sign up for Internet Banking

You will need your Health Savings Account (HSA) number, Social Security Number, and email address.



[View a demo](#) about signing up.

Note :To sign up for Internet Banking, you must have an active account with HSA Bank. [Open](#) an HSA today.

The screenshot shows the HSA Bank internet banking dashboard. At the top, there are navigation tabs for Profile, Accounts, Transfer, Messages, and Documents. Below this, there are sections for 'Transfer Accounts', 'Available Balance' (showing \$3,034.07), and 'Total Lifetime Contributions' (showing \$18.00). A central video player is visible with a play button. At the bottom, there is a table of accounts with columns for 'Acc', 'Account Type', and 'Status'. The table lists three accounts, all of which are 'Verification Pending'. A '0.00' balance is also visible at the bottom of the page.



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[Profile](#)

[Transfer](#)

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[Message \[ 1 \]](#) | [Contact Information](#) | [Statement Delivery Preference](#) | [Change Password](#) | [Security Information](#)

## Profile

The Profile area allows you to manage your personal information, statement delivery preference and security information. To manage your email notification preferences, please see [Email Notifications](#) under the Tools menu.

### Message [ 1 ]

This section allows you to read messages related to your account. The Message Center will provide messages regarding changes to your account as well as new products and services HSA Bank will be offering.

### Change Contact Information

This section allows you to update your address, phone number and email address. Additionally, you can designate a seasonal or alternative address.

### Statement Delivery Preference

This section allows you to update your statement delivery preferences. Choose to receive electronic statements here.

### Change Password

This section allows you to update your internet banking password at any time. You will also be prompted to select a new password every 90 days.

### Update Security Information

All accounts are required to select a security picture, phrase and three security Questions. This section allows you to review or edit your current security preferences.

## INTI:RNET BANKING ft

### Summary

Available Balance

**0** \$0.93

Year to Date Contributions

**0** \$0.00

Total Lifetime Contributions\*

**0** \$5.20

Total Lifetime Distributions\*

**0** \$4.27

\* Data goes back to 2004, if applicable.

### Online Demo



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### Statement Preferences

If you would like to change your delivery preference, please select your preferred method below.

To withdraw your consent to receiving tax documents (RS forms) electronically, please contact our Client Assistance Center at the phone number listed on our [Contact Us](#) page. It may take up to five business days for your delivery preference to become effective for paper tax documents for current and future mailings.

[Learn More](#)

I would like to receive FREE monthly e-statements. I will also receive electronic bank disclosures, notices and tax documents.

I would like to receive quarterly paper statements at a fee of \$0.75 per quarter. I will also receive paper bank disclosures, notices and tax documents.

I would like to receive monthly paper statements at a fee of \$0.75 per month. I will also receive paper bank disclosures, notices and tax documents.

[» Update Information](#)

Note: It may take up to 5 business days for your delivery preference to become effective.

[Summary](#)

[Gifts](#) | [Taxes](#)

Available Balance

**\$0.93**

Year-to-Date Contributions

**\$0.00**

Total Lifetime Contributions

**\$5.20**

Total Lifetime Distributions

**\$4.27**

\* Oeta goe's bi,k to 2004, if applicable.

[Online Demo](#)



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### Account Summary

Account Number	Initial Daily Balance	Available Balance	HSA Links
14493504	\$093	\$093	<a href="#">Transfers</a>   <a href="#">Statements</a>   <a href="#">Tax Documents</a>

### 2014 Contributions

Single Contribution Limit • \$3,300.00

Family Contribution Limit • \$6,550.00

You have contributed: \$0.00 [CONTRIBUTE](#)

### 2013 Contributions

Single Contribution Limit • \$3,250.00

Family Contribution Limit • \$6,450.00

You have contributed: \$0.00 [CONTRIBUTE](#)

#### PROFILE

It is important that we have your most current contact information on file. We make it easy for you to update your basic account information online. Simply click one of the links below to

#### TRANSFERS

Setting up transfers to and from your HSA is quick and straightforward. You can transfer funds between your HSA and an investment account or external bank account. To view our

#### RESOURCES

Our goal is to help you access and manage your HSA simply and effectively. Start taking advantage of many resources we have to offer by selecting one of the following links.

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- E-Documents

[Schedule Transfers](#) | [Transfer Accounts](#) | [Online Transfer Instructions](#)

## Transfers

The Transfer area allows you to establish and manage your online transfers and transfer accounts.

### Scheduled Transfers

This section allows you to schedule one-time or recurring transfers from an external bank account to your HSA. If you have an investment account tied to your HSA, you are also able to transfer funds to and from the investment account.

### Transfer Accounts

Before you can make transfers to your HSA, you must establish and verify an account at an external financial institution. This section allows you to add, remove, and verify external transfer accounts.

### Online Transfer Instructions

The online contribution instructions provide an overview of the process for establishing an external transfer account and setting-up a new transfer.

## Summary

Available Balance

**a** \$0.93

Year-to-Date Contributions

**a** \$0.00

Total Lifetime Contributions -

**a** \$5.20

Total Lifetime Distributions -

**a** \$4.21

- Dots goe\$ b0<k to 2004, if applicable.

### Online Demo



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### Tools

#### Email Notifications

This section allows you to select email notifications for account activity including: contributions, distributions, balance thresholds, and e-statements.

#### Download Activity

To help you manage your Health Savings Account Activity, you have the ability to download your account activity to Quicken or Microsoft.

#### Healthcare Resources

A Health savings account provides you with control over your health care choices and savings. This section provides information on how to use your HSA funds for qualified medical expenses.

#### Contact Us

This area allows you to securely submit your Questions to HSA Bank. Responses are typically provided within one business day.

Summary

11/11/14

Available Balance

D \$0.93

Year-to-Date Contributions

D \$0.00

Total Lifetime Contributions

D \$5.20

Total Lifetime Distributions

D \$4.21

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### E-documents

[E-statements](#)  
Statements are available to view in an electronic format. To assist with tax reporting, you are provided with an 18-month history.

[Tax Documents](#)  
For record-keeping purposes, your current year and prior tax documents are available in PDF format for download.

[Online Banking Agreement](#)

[Privacy Statement](#)

[Summary](#) | [Message \[1\]](#)

Available Balance  
**U \$0.93**


Year-to-Date Contributions  
**U \$0.00**

Total Lifetime Contributions •  
**U \$5.20**

Total Lifetime Distributions •  
**U \$4.27**

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[Online Demo](#)



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Profile

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### Invest and grow your HSA

To help you make the most of your health savings, we offer two self-directed investment options with:

- No HSA balance required to participate. (Minimum trade requirements may apply.)

### Enroll Today!

#### TD Ameritrade Brokerage Services

Gives you access to stocks, bonds and thousands of mutual funds, plus:

- Provides secure, online trade confirmations and account statements
- Lets you set up multiple watch lists
- Trading fees may apply

Trading fees may be applied by TD Ameritrade Brokerage Services.

[See an overview](#) of the TD Ameritrade investment process.

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Select an Account: | 14493504 v |



#### DEVENIR Mutual Fund Selection

Lets you invest in historically high-performing mutual funds, with:

- No load and load-waived mutual funds
- No trading fees for a pre-selected group of mutual funds
- Online access to investment account balance, elections, trades and more through HSA Bank's Internet Banking
- Access to Morningstar® reports and other planning tools including an HSA asset allocation calculator
- Annual fee \$24 deducted prorata from investment account balance

[See an overview](#) of the DEVENIR investment process.

Select an Account: | 14493504 v |



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