School District of Elmbrook 1/13/2027 Bulk Transfer | HSA Participant Instructions | Liquidation Deadline: 12/16/2026

For Optum to transfer funds to Associated Bank, all investments must be liquidated by the **12/16/2026** liquidation deadline. HSA Accountholders also need to turn-off the auto-transfer functionality before they liquidate investments. Otherwise, auto-transfers will automatically resume 30 days following liquidation of investments. Employees may then see their liquidated investments be reinvested if they did not turn off auto-transfers at time of liquidation.

HSA participants who have liquidated investments should also continue to monitor their investment balances to ensure any additional investments are also liquidated by the liquidation deadline. There could also be trailing dividends that will automatically post to investment balances. Employees need to liquidate any dividends that post to investments as well, prior to the liquidation deadline.

To turn off the Auto-transfer function:

1. Sign in to your HSA account
2. Select I Want To
3. Select Manage HSA Investments
4. Select Manage auto-transfers
5. Click on Pause Automatic Investments
6. Click Submit to pause Automatic investments

Note: If you have elected auto-transfers (allowing funds to be invested automatically once your cash account reaches a designated amount), you must turn this feature off before you liquidate investments and before the liquidation deadline. You must leave this feature turned off for your account transfer to be processed.

To turn off any scheduled ad hoc HSA contributions:

1. Sign in to your HSA account
2. Select I Want To
3. Select Manage HSA Contributions
4. Select Add/Change Contributions
5. Select Cancel Full Schedule
6. Click Submit

To liquidate your HSA MUTUAL FUND investments:

1. Sign in to your account
2. Select I Want To
3. Select Manage HSA Investments
4. Select Sell Investments
5. Click Liquidate Entire Portfolio
6. Click Submit

To liquidate your HSA BETTERMENT investments:

1. Sign in to your account
2. Select I Want To
3. Select Manage HSA Investments
4. Select Transfer Betterment to HSA
5. Add the amount to transfer in the ‘amount to transfer’ box, equal to the full Investment Balance amount
6. Click the Continue button
7. Verify investment amount to be transferred, then click the Confirm button

HSA Save-It! Records entered to document eligible expenses paid with personal funds will only be available until **12/24/2026**. HSA participants, who provided Positive Consent for the Bulk Transfer, will no longer have access to the Save-It! receipts so it is important to download them beforehand. Otherwise, claim documentation can still be accessed via the Claim ID transaction.

Access HSA Save-It! Records

1. Log in to your online account
2. Select I Want To
3. Select Go to my HSA Save-it!
4. All your HSA Save-It! records will display, select the Claim ID to view a specific record.
5. Your documentation will display at the bottom of a record. Click on the thumbnail of your documentation to view it as a larger image, then right-click on the document to download and save it to your local drive.