Transfer your HSA account balance to Fidelity

Act now to transfer your HSA account balance from Inspira to Fidelity Investments®

As previously announced, Fidelity Investments® is the new service provider for the Health Savings Account (HSA), effective **January 1, 2025**. Now that the HSA is live at Fidelity, you can transfer any account balance that you have at Inspira to Fidelity at any time by initiating an individual transfer. While this is optional, you may consider transferring your HSA account balance to Fidelity for simpler account management and peace of mind knowing your health savings account funds are all in one place.

What do I need to do?

To transfer your account balance from Inspira to Fidelity, go to Fidelity.com/TOA, select "Start a Transfer," and follow the step-by-step instructions. You may be charged a $25 fee by Inspira to transfer your account balance. This fee will be deducted from your account balance prior to it being transferred to your Fidelity HSA.

What happens next?

After you initiate an individual transfer of your HSA account balance, Inspira and Fidelity will begin working together to process the transfer. Once Fidelity receives your balance transfer from Inspira, it may take up to 16 business days for the funds to clear and be available for use in your Fidelity HSA.

If you have any questions or need help initiating an individual transfer, call **800-544-3716** to speak with an HSA specialist, **Monday through Friday, 8:30 a.m. to 8:30 p.m. ET**.

The timing of the plan changes and transition period, including any asset reallocations, described within depends on a variety of factors, which may include the timing and accuracy of the transfer of data, receipt of instructions, and receipt of assets. Changes in any of these factors may result in changes to the timing of the delivery of services, the transition period, and/or the dates on which, and thus the prices at which, assets in your account are sold and/or reinvested.

The information provided herein is general in nature. It is not intended, nor should it be construed, as legal or tax advice. Because the operation of an HSA has tax implications, you are strongly encouraged to consult your tax advisor before opening an HSA. You are also encouraged to review information available from the Internal Revenue Service (IRS) for taxpayers, which can be found on the IRS website at IRS.gov. You can find IRS Publication 969, Health Savings Accounts and Other Tax-Favored Health Plans, and IRS Publication 502, Medical and Dental Expenses, online, or you can call the IRS to request a copy of each at 800-829-3676.

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