![SelfcareHSA logo - Powered by Sunwest Bank, Custodian, Member FDIC]
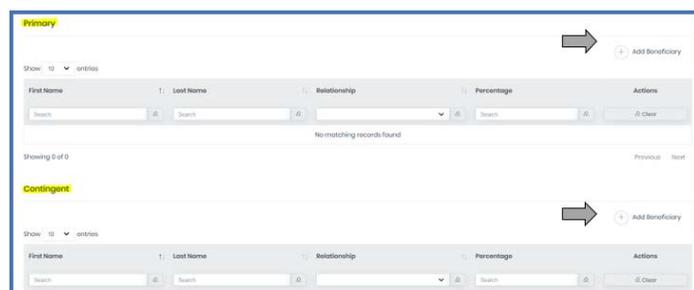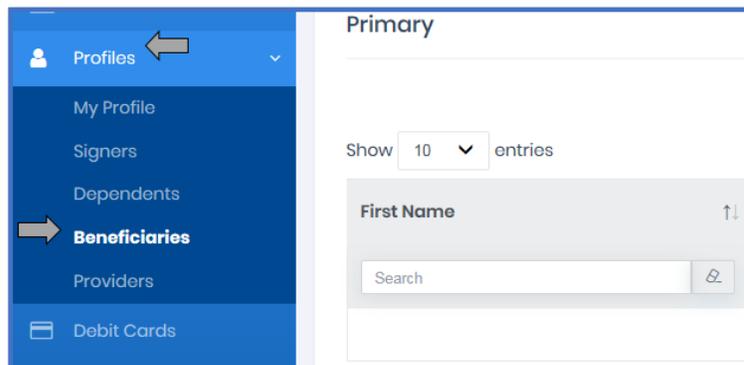
HOW TO:

Add a Beneficiary

Step 1:

After you have logged into your portal you will select Profiles then Beneficiary from the left-hand menu.

Step 2:

Select Add Beneficiary. You will select the Add Beneficiary for the type of beneficiary you would like to add. For example, if you want to add a primary select Add Beneficiary within the primary section

Step 3:

Enter all required data that is marked with an * and designate an ownership percentage then submit. If you are in a community property state there are special rules, follow the prompts. If you are designating anyone besides a spouse as the sole primary beneficiary while in a community property state, you will need to complete the HSA Designation of Beneficiary form.