Transfer Dates from HSA Bank to Liberty Health HSA Bank

1. Liberty Health HSA Bank Enrollment Form
   a. Paper
   b. Electronic - OES Forms

2. Deadline Date to Submit Transfer Form to IEBP
   a. WET SIGNATURE Bank Requirement
   b. First Bulk Transfer: Return to IEBP by Oct. 20, 2017
   c. Second Bulk Transfer: Return to IEBP by Jan. 19, 2018

3. Bulk Transfer Dates
   a. First Transfer = Dec. 14, 2017
      i. Collect forms for first bulk transfer
         ▪ Nov.22nd - Dec.14th Black Out
         ▪ Not in HSA Bank Purse
         ▪ Available Liberty Health HSA Bank Purse
   b. Second Transfer = Mar. 14, 2018

4. Open Enrollment Package

5. Marketing Communication
   a. Liberty’s Customer Support: (844) 577-7792
   b. Single Sign On (SSO) to New WealthCare Admin Portal: iebp.org

6. Liberty Health Bank Disclosures
   a. Liberty Health Bank Privacy Policy
   b. Liberty Health Bank Patriot Act
   c. Liberty Health Bank Terms & Conditions
   d. Liberty Health Bank Full Disclosures

<table>
<thead>
<tr>
<th>Anniversary Plan Year Month</th>
<th>IEBP Transfer Form Due Date</th>
<th>HSA Bank Account Closed</th>
<th>HSA Bank Transfer Money to Liberty Health HSA Bank</th>
<th>Blackout Period</th>
<th>Employer Totals</th>
<th>Participants with Deposits</th>
<th>Participants without Deposits</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oct. 1st thereafter, deposits will go to Liberty Health HSA Bank</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan. 1st thereafter, deposits will go to Liberty</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan. 1st thereafter, deposits will go to Liberty</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan. 1st thereafter, deposits will go to Liberty</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jan. 1st thereafter, deposits will go to Liberty</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
HSA Issues Serviced by IEBP - (800) 282-5385
Basic HSA issues and questions should be handled by IEBP. Examples *(not a complete list)* of basic HSA issues are:

- What is my HSA account number?
- How do I reimburse myself from my HSA?
- How can I make deposits to my HSA?
- What is my HSA balance?

HSA Issues Serviced by Liberty Savings HSA Bank - (844) 577-7792
Liberty Savings HSA Bank specific questions that IEBP is not able to answer and more complex HSA issues should be directed to the Liberty Savings HSA Bank Customer Support team at the number above. Examples *(not a complete list)* of HSA issues that should be transferred to Liberty Savings HSA Bank Customer Support are:

- Do I qualify for the investment option and how do I access it?
- Can I use my HSA funds for anything other than medical expenses?
- I am leaving my Employer, what do I do?
- My Employer made a mistaken contribution to my HSA account, now what?