








Optum Bank Welcome Kit

Materials listed here may be presented to customers who wish to see what their employees will be receiving. They are **automatically mailed to the account holder's home by Optum Bank** once an application has been received and processed and the account has been opened.

THE MATERIALS BELOW CANNOT BE ORDERED

Document Name	Attachment
Outer Envelope 6 x 9.5" Envelope with "Your Health Savings Account materials are here!"	Optum Branded OME
Welcome Letter Provides account number, URL for online self-service and customer service toll-free number and hours.	 Welcome Letter
Health Savings Account (HSA) Frequently Asked Questions and Eligible/Ineligible Expenses An account holder may use this sheet to find the answers to questions they may have about their HSA and to determine which expenses are eligible or ineligible.	 FAQs
Contribution/Deposit Form An account holder may use this sheet to make a contribution to the HSA.	 Contribution Form
Schedule of Fees Documents fees and charges associated with the HSA.	 F2000H
Truth In Savings/Funds Availability Details tiered interest rates, annual percentage yields and availability of funds.	 TISA
Custodial and Deposit Agreement Describes the terms and conditions between the account holder and the account custodian, Optum Bank.	 Custodial Agreement
Privacy Notice Outlines Optum Bank's privacy policy and gives an account holder the opportunity to limit disclosures of personal information via an opt-out reply form.	 Privacy Notice
Business Reply Envelope Account holder can use this postage-paid envelope, addressed to Salt Lake City, to return the Contribution/Deposit Form.	PO Box 271629 BRE