



How to Add or change my beneficiaries.

Spousal Consent If you are married in common law or in a community property or marital property state, you must designate your spouse as your Primary Beneficiary. If you wish to designate someone other than your spouse, please call customer service if you wish to obtain this form.

1. If you are married you must Add your Spouse as your primary Beneficiary at 100%
2. You can add contingent death beneficiaries and assign a share percentage that equals 100%

Add Spouse

The screenshot shows the Allegiance by Cigna Healthcare website interface. The top navigation bar includes 'Home', 'Accounts' (circled in green), 'Tools & Support', and 'Message Center 43'. Below this is a dark blue menu with four main sections: 'ACCOUNTS', 'INVESTMENTS', 'PROFILE' (circled in green), and 'I WANT TO'. The 'PROFILE' section contains 'Profile Summary', 'Banking', 'Payment Method', and 'Login Information'. The 'I WANT TO' section contains 'Reimburse Myself', 'Send Payment', 'Contribute to HSA', 'Manage Investments', and 'Manage My Expenses'. Below the menu is a row of action buttons: 'Update Enrollment' (blue), 'Reimburse Myself', 'Send Payment', 'Contribute to HSA', and 'Manage Investments' (all orange). A 'Manage My Expenses' button is also present. At the bottom, there is a 'My HSA' section.

Profile / Profile Summary

Profile

[Update Profile](#)

Dependents

[Add Dependent](#)

THOMAS JEFFERSON
ADDRESS
6548 Main Ave.
MISSOULA, MT 59806
United States

No dependents

EMAIL ADDRESS

@.com

GENDER

Male

MARITAL STATUS

Married

USERNAME

PARTICIPANT ACCOUNT ID

Beneficiaries

[Add Beneficiary](#)

Profile / Add Beneficiary

Beneficiary Information

*Required

You may designate a beneficiary(s) for your Health Savings Account. The designated beneficiary(s) will receive your HSA assets in the event of your death.

If you are married in common law or reside in a community property state, you must designate your spouse as your Primary Beneficiary. If you wish to designate someone other than your spouse, then your spouse must consent in writing via the Beneficiary Change Form.

Name *

SSN *
 - -

Birth Date *

Address *

Select a state...

Relationship *

Type * Primary Contingent

Cancel

Submit

Add Contingent Beneficiary – the system will add the contingent beneficiary at 100% share

Profile / Profile Summary

Profile

[Update Profile](#)

THOMAS JEFFERSON
ADDRESS
6548 Main Ave.
MISSOULA, MT 59806
United States

EMAIL ADDRESS
[redacted].com

GENDER: Male MARITAL STATUS: Married

PARTICIPANT ACCOUNT ID
[redacted]

Dependents

[Add Dependent](#)

No dependents

Beneficiaries

[Add Beneficiary](#)

MARTHA JEFFERSON
Type: Primary
Share: 100%
[View / Update](#)
[Remove](#)

If you want to add a second contingent beneficiary, you will be asked to designate the share percentage at the bottom of the page.

Profile / Profile Summary

Profile

[Update Profile](#)

Dependents

[Add Dependent](#)

THOMAS JEFFERSON

ADDRESS

6548 Main Ave.
MISSOULA, MT 59806
United States

EMAIL ADDRESS

_____@_____.com

GENDER

Male

MARITAL STATUS

Married

PARTICIPANT ACCOUNT ID

No dependents

Beneficiaries

[Add Beneficiary](#)

MARTHA JEFFERSON

Type: Primary
Share: 100%

[View / Update](#)
[Remove](#)

MARY JEFFERSON

Type: Contingent
Share: 100%

[View / Update](#)
[Remove](#)

Profile / Add Beneficiary

Beneficiary Information

*Required

You may designate a beneficiary(s) for your Health Savings Account. The designated beneficiary(s) will receive your HSA assets in the event of your death.

If you are married in common law or reside in a community property state, you must designate your spouse as your Primary Beneficiary. If you wish to designate someone other than your spouse, then your spouse must consent in writing via the Beneficiary Change Form.

Name *
Martha
L
Jefferson

SSN *
456 - 78 - 9123

Birth Date *
4/1/1990

Address *
6548 Main Ave
Missoula
Montana
59808

Relationship *
Dependent

Type *
 Primary Contingent

Primary Beneficiary Share Percentage

Martha L Jefferson 50 %

Mary Jefferson 50 %

Cancel

Submit