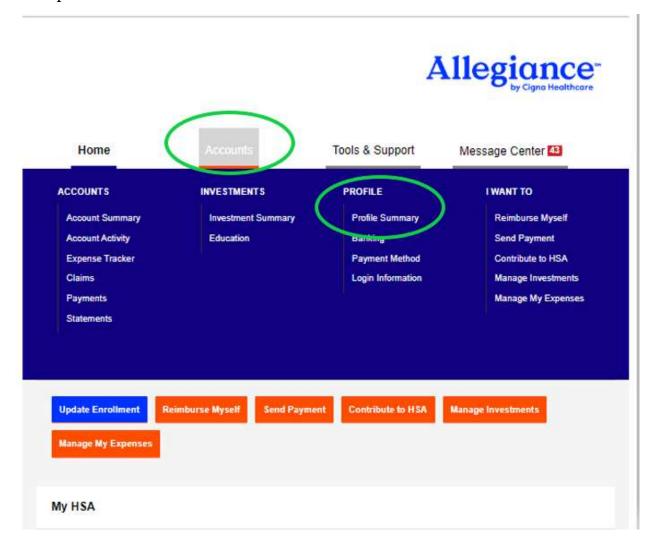


How to Add or change my beneficiaries.

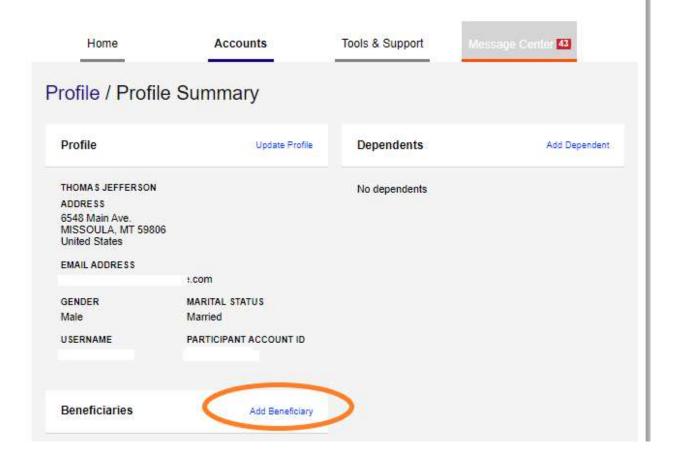
Spousal Consent If you are married in common law or in a community property or marital property state, you must designate your spouse as your Primary Beneficiary. If you wish to designate someone other than your spouse, please call customer service if you wish to obtain this form.

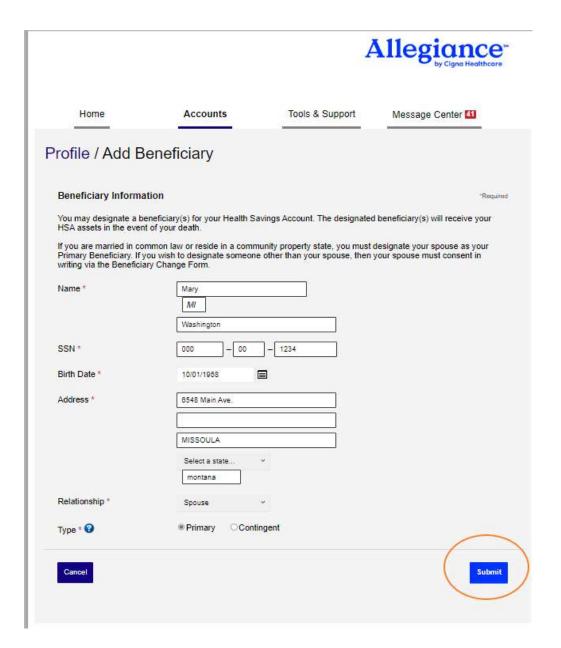
- 1. If you are married you must Add your Spouse as your primary Beneficiary at 100%
- 2. You can add contingent death beneficiaries and assign a share percentage that equals 100%

Add Spouse

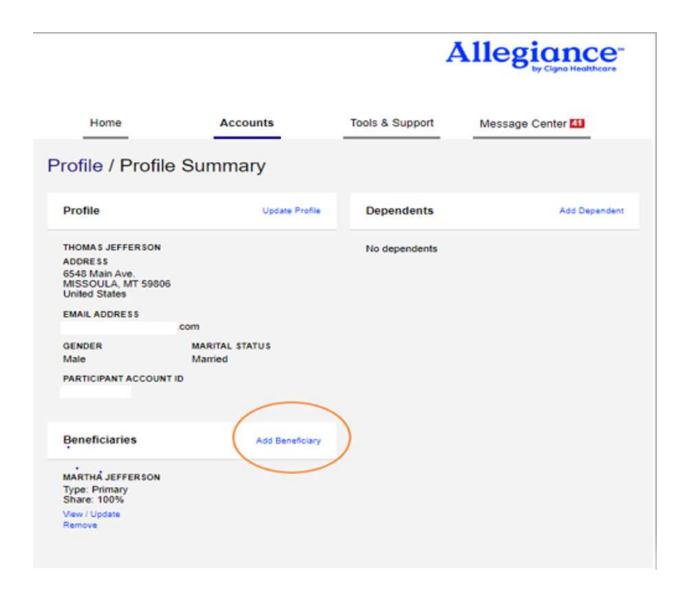








Add Contingent Beneficiary – the system will add the contigent beneficiary at 100% share



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



Accounts Home Tools & Support Message Center [1] Profile / Profile Summary Update Profile Dependents Profile Add Dependent THOMAS JEFFERSON No dependents **ADDRESS** 6548 Main Ave. MISSOULA, MT 59806 United States EMAIL ADDRESS .com GENDER MARITAL STATUS Male Married PARTICIPANT ACCOUNT ID Beneficiaries Add Beneficiary MARTHA JEFFERSON MARY JEFFERSON Type: Primary Share: 100% Type: Contingent Share: 100% View / Update View / Update Remove Remove



Accounts Tools & Support Home Message Center [11] Profile / Add Beneficiary Beneficiary Information 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 Jefferson SSN* 456 78 9123 Birth Date * 4/1/1990 Address * 6548 Main Ave Missoula Montana 59805 Relationship * Dependent Type * 🕢 **Primary** Contingent Primary Beneficiary Share Percentage 0 Martha L Jefferson 50 Mary Jefferson 50