



Need help filling out the Disband notice?

Here are some answers and explanations.

1. Why are you leaving Further?

- a. Select "Merger or acquisition" and write HealthEquity (HQY) as the company name.
- b. Are you leaving Further and moving to another administrator? Yes; write "HealthEquity" as the company name.
- c. Would you need a bulk transfer of HSA funds? Yes.

2. Which product(s) will you be disbanding?

- a. Select "All Products"
 - i. Disband date: 12/31/2021
 - ii. Runout months: Runout is an employer-specific decision. It's a best practice to provide 30-90 days runout to allow members to file claims they may have incurred during 2021. However, Further may charge your ministry additional fees to administer runout.

3. Indicate Disband Dates and Runout Months:

- a. Use the Disband Date of 12/31/2021 for all applicable products.
- b. Enter your selected months of runout for all applicable products.

4. Claims Appeals:

- a. It's recommended that you select Further as the entity that'll process appeals/adjustments for members.

5. Submission of file:

- a. We recommend submitting via secure email to expediate processing of the disband.