

HealthEquity – Add or Change HSA Beneficiary

The guide walks you through how to add or change a beneficiary for your HSA in the HealthEquity portal.

Walkthroughs:

- 1.0 Navigation Path

Audience: All

Process Step & Description	Action
<p>1.0 Navigation Path</p>	<p>Getting Started</p> <ul style="list-style-type: none"> • Navigation Path https://answers.healthequity.com/app/answers/detail/a_id/1560/~/-/add-a-beneficiary • Click “Complete Online” • Log into your personal HealthEquity account <p style="text-align: center;">Add a beneficiary Updated 08/04/2020 08:54 PM</p> <p style="text-align: center;">How do I add beneficiaries to an account?</p> <p style="text-align: center;">COMPLETE ONLINE</p>

- Select the appropriate option and click continue

Beneficiaries

Please Select Beneficiary Status

- I am not married and I understand that if I become married in the future, I must complete a new HSA Beneficiary Change/Spousal consent.
- I am married and I choose to designate my spouse as the primary death beneficiary.
- I am married and I choose to designate a primary death beneficiary other than my spouse, and/or I live in a community property state; California, Idaho, Louisiana, Nevada, New Mexico, Texas, Washington and Wisconsin, my spouse must agree in writing. This option requires signature. please follow the instructions on the Beneficiary Designated form: [Beneficiary Designation Form](#)

Continue

- Click the purple “Add Beneficiary” and/or “Add Trust or Estate”.
- Click “Ok” when done.
- Repeat this process for however many beneficiaries you need to add.

Add Beneficiary

First Name:

Middle Name:

Last Name:

Suffix:

Birth Date: ... ⓘ

Relationship:

SSN: (NNN-NN-NNNN) ⓘ

Use the same address of the member.

Street Address: ⓘ

City:

State:

Zip Code:

ⓘ The Birth Date, SSN, and Address are required before a payment can be issued.

- Once you've added all of your beneficiaries, allocate the percentage for primary and contingent beneficiary.
- When complete, click "Save".

Beneficiaries

At the time of your death, if any of the named beneficiaries are minors, a guardian must hold and manage the money until the beneficiary reaches the age of majority or a court must order us to pay the minor. Your estate may incur additional legal and other expenses to appoint a guardian for the minor beneficiary. For specific legal implications regarding beneficiary designations, contact your legal advisor.

[+ Add Beneficiary](#)
[+ Add Trust or Estate](#)

Name	Relationship	Primary %	Contingent %
  [Redacted Name]	Child	<input type="text" value="50"/>	<input type="text" value="0"/>
  [Redacted Name]	Child	<input type="text" value="50"/>	<input type="text" value="0"/>
  [Redacted Name]	Other	<input type="text" value="0"/>	<input type="text" value="100"/>
		100	100

Save
Cancel