

The Consultant's HSA Solution

HSAs are on the Rise

As the cost of health care continues to rise and the projected financial cost for retiree medical expenses grows, Health Savings Accounts (HSAs) are becoming increasingly popular. Through MyHSA, consultants can leverage a turn-key, best in class solution or customize their own.

Why MyHSA?

MyHSA is a 401(k) inspired HSA with a breadth of fund options, along with risk-based asset allocation models and a guaranteed investment option. Account holders have access to their HSA anytime, on their preferred device via www.myhsa.com or through their defined contribution plan login, if we provide their retirement plan recordkeeping as well. There they will find balance, performance, contribution and distribution information, along with the many other resources to help them get the most out of their MyHSA experience. Key features of MyHSA include:

- Automatic investment of contributions above \$200
- A guaranteed investment option that pays a fixed interest rate of 4.92% (through Sept. 30, 2024)
- No transferring of funds between cash and investment accounts
- A debit card that gives you access to 95% of your total account balance, including both cash and investments
- Investment options from most fund families
- Asset allocation portfolios
- Single sign on with EPIC RPS record kept retirement plans

Make MyHSA Your Own

As a financial institution, MyHSA offers you the unique ability to offer your own HSA program using our infrastructure. Your account holders will have the same low cash threshold, automatic investing and access to invested dollars on their debit card that make owning and investing in an HSA easy and seamless. You have the ability to curate your own investment menu, offer asset allocation portfolios and set your own fee. With your own HSA solution, you can help your clients bridge the gap between health and wealth, provide a consistent, comprehensive service and insulate your clients from competitors.

As of the end of 2023

There were over

37 million

Health Savings Accounts

By the end of 2026

Estimates project

**\$168 billion in
HSA assets**

*Devenir Research 2023 Yearend
HSA Market Statistics &
Trends Executive Summary*

Contact your EPIC RPS Sales Consultant or Relationship Manager to learn more about how MyHSA can compliment your practice!