

# Further Transition Communication Template for Members Audience:

Your Members with a Further HSA, FSA, HRA,  
and/or DCFSA.

Recommended Send Timing: 60–70 days  
prior to your transition date.

## Instructions for Use:

Please update the highlighted fields  
before sending to members:

**[Transitioning Product(s)]**

List your company's transitioning products

**[Transition Date]**

Your company's transition date

**[Transition Website URL]**

The HealthEquity member transition site specific  
to your company's transition

**[Client Name]**

Your company name



## Subject Line:

Important Update: Your  
[HSA/FSA/HRA/DCFSA]  
Is Transitioning to HealthEquity

# Hello,

We're reaching out with a quick reminder about an important update to your [Health Savings Account (HSA) / Flexible Spending Account (FSA) / Health Reimbursement Arrangement (HRA) / Dependent Care FSA], currently administered by Further.

On [Transition Date], your account will transition from Further to HealthEquity. We're confident this change will bring you a personalized approach to maximizing your healthcare benefits, easy account management, and dedicated, 24/7 member support.

## What You Need to Know

**Account Access:** You'll soon receive instructions from HealthEquity on how to access and manage your account through the HealthEquity portal.

**New Debit Card:** If applicable, you'll receive a new HealthEquity Visa® Card\* in the mail. Watch your mailbox for this important delivery.

**Action Needed:** Please log in to your current Further account before the transition date to verify that your email, mailing address, and other personal details are accurate.

**HSA Blackout Period (HSA Members Only):** Approximately nine calendar days before the transition, your HSA will enter a temporary blackout period to securely transfer your funds. If you need to pay for a qualified medical expense during that time, here are two options:

- **Option 1:** Pay out of pocket and submit a reimbursement after the blackout period. [Click here](#) for more information.
- **Option 2:** Make a post-tax contribution to your HealthEquity HSA. [Follow these steps](#) for more information.

## Stay Informed

For detailed timelines and updates, visit your transition website:

[Transition website - include hyperlink for member transition website]

You'll also receive important emails from: [healthequity@e.healthequity.com](mailto:healthequity@e.healthequity.com) — keep an eye on your inbox.

If you have questions, HealthEquity's Member Services team is available 24/7 at 844.351.6865.

Thank you for your attention — we're excited to bring you a remarkable benefits experience with HealthEquity.

Warm regards,

[Client Name]

\*This card is issued by The Bancorp Bank, N.A., pursuant to a license from Visa U.S.A. Inc. Your card can be used everywhere Visa debit cards are accepted for qualified expenses. This card cannot be used at ATMs and you cannot get cash back, and cannot be used at gas stations, restaurants, or other establishments not health related. See Cardholder Agreement for complete usage restrictions.