

Inspira Member Website

Create your profile & Login



Go to inspirafinancial.com

- Click, “Log in.”
- If you’re a new user Click, “CREATE PROFILE” to get started.

The screenshot shows the Inspira Financial member login page. At the top, the Inspira Financial logo is displayed. Below the logo, the heading "Select your secure login" is centered. On the left, there is a vertical navigation menu with three options: "Member >", "Employer", and "Broker/Consultant". The "Member >" option is currently selected. To the right of the menu, the "Member Login" section contains two input fields: "USERNAME" with the placeholder text "Enter your username" and "PASSWORD" with the placeholder text "Enter your password" and a small icon of a hand typing. Below these fields is a blue "LOGIN" button. Under the "LOGIN" button, there are two links: "Forgot username?" and "Forgot password?". To the right of the login section, there is a section titled "New to Inspira Financial?" with the text "Create an online profile to manage your Inspira account." and a yellow "CREATE PROFILE" button. At the bottom of the page, there are three sections: "Manage your account on the go" with a mobile app icon and the text "Download the Inspira Mobile™ app today.", "Download on the App Store" with the Apple logo, and "GET IT ON Google Play" with the Google Play logo.

Member >

Member Login

USERNAME

Enter your username

PASSWORD

Enter your password

LOGIN

[Forgot username?](#) | [Forgot password?](#)

New to Inspira Financial?

Create an online profile to manage your Inspira account.

CREATE PROFILE

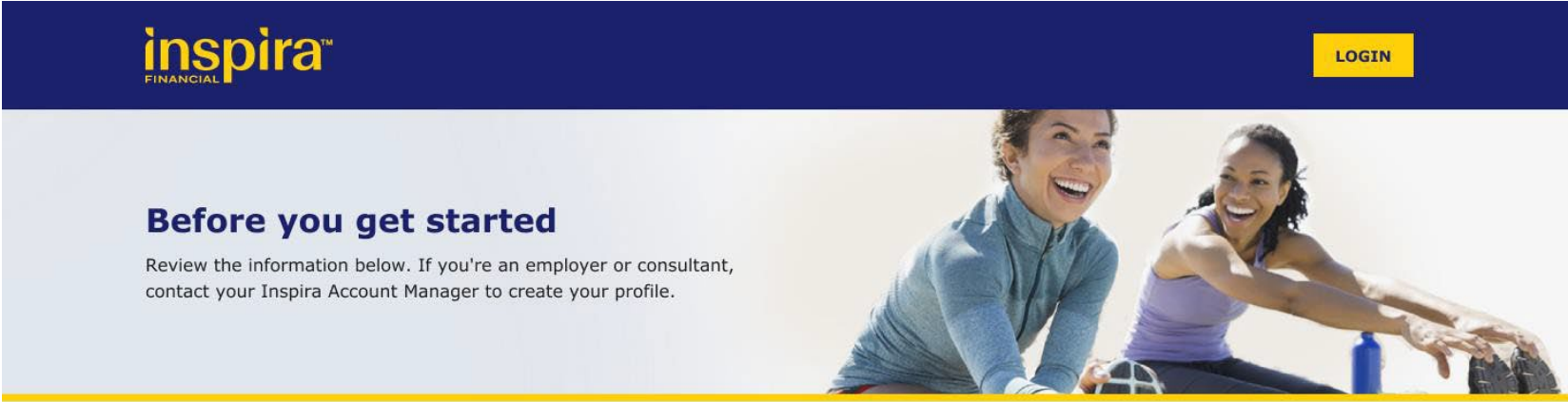
Manage your account on the go

Download the Inspira Mobile™ app today.

Download on the App Store

GET IT ON Google Play

Be sure to have this information nearby ➡



Be sure to have this information nearby
Then you'll be ready to set up your online account.



**Social Security number or
Employee ID number**

You only need to enter the last four digits
or characters, if applicable. This helps us
identify you.



Email address

We'll ask you to share your email address.
We'll only use it to send important account
information.

GET STARTED

Complete this page to help us identify you ➡



LOGIN

Find me



Complete these fields to help us identify you

*Indicates required field

First name*

James

Last name*

Smith

Mailing address*

123 Main Street

Apartment/suite/other

Enter apartment/suite/other

Zip code *

06516

BACK

CONTINUE

Complete this page to help us identify you ➡



[LOGIN](#)

We need a little more information



Complete these fields to help us identify you

*Indicates required field

Enter the last four digits of your Social Security number OR the last four characters of your employee ID.*

Social Security number ?

OR

Employee ID number ?

Confirm your date of birth.

Date of birth.*



BACK

SUBMIT

FOR CARDHOLDERS ONLY

Enter the last 4 digits of your card number

If your account does **NOT** include a Inspira debit card, you won't see this page



Create your profile ➡

After you verify your account, you'll create your profile. We'll ask you to:

- Create a username and password
- Set up security questions and answers
- Review/accept the Online Services Agreement*

*When you agree to the terms and conditions, we'll turn on your paperless settings for certain notifications. You'll simply get your documents online. This will be in place unless you make changes to your notifications in Account Settings

QUICK TIP: After you create a username and password, you can use it to log into the Inspira Mobile® app.



The screenshot shows the 'Create your profile' page for Inspira Financial. At the top, there's a dark blue header with the 'inspira FINANCIAL' logo on the left and a yellow 'LOGIN' button on the right. Below the header is a large banner image of two women smiling and stretching. The main heading 'Create your profile' is centered in blue. The form content starts with a 'Welcome James' message, followed by instructions to complete the profile. The 'Your information' section includes fields for Username, Password, Confirm password, Email address, Confirm email address, Phone number, and Mobile phone number. Each field has a red asterisk indicating it's required. Below these are security questions: 'Question 1' with a dropdown menu and 'Answer 1' with a text input field.

inspira
FINANCIAL

LOGIN

Create your profile

Welcome James
Complete this page to create the profile for your online account. The username and password you choose will also work for the Inspira Mobile™ app.

Your information
*Indicates required field

Username*
jamesmith1

Password*

Confirm password*

Email address*
jamesmith@email.com

Confirm email address*
jamesmith@email.com

Phone number* ?
123-456-7890

Mobile phone number* ?
987-654-3210

Question 1*
What was the name of your first pet?

Answer 1*
Spot

Review the terms and conditions of our Online Service Agreement

Question 1 *

What was the name of your first pet?

Answer 1 *

Spot

Question 2 *

What was the name of your fa

Answer 2 *

Mr. Doe

Question 3 *

What's your father's middle na

Answer 3 *

Lee

Review the terms and condit

Online Services Agreement >

When you agree to these terms
will be in place unless you make

SUBMIT

Online Services Agreement

*Once you read through the entire agreement, you can agree to the terms and conditions.

Additional Terms and Conditions for HSA Investment Account Owners

ONLINE TRADES

If you choose to trade online through any system or platform made available to you through Inspira Online, you acknowledge and agree that such trading is at your sole risk and that of the account being traded. You are solely responsible for any loss incurred as a result of a trade entry error. You agree that you will review your entry before submitting the trade, and the trade once submitted is not subject to cancellation. Inspira Financial is not liable for any error made by the broker executing the trade. You agree not to enter any trade that will overdraft your account and agree that Inspira Financial is not required to execute any such trade. There is the risk that outages involving your access to the Internet, our own systems, or the trading markets or systems we utilize may interfere with your ability to access your online account.

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(1/24)

I AGREE

To agree, you must scroll through the entire agreement.

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Share my screen

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Request a verification code to be sent by email or text

This is how we verify your account.



Request a verification code

To get started, choose how you want to receive the verification code. If you already have a code, select **I received my verification code**.

Email my verification code

 j*****h@email.com

Text my verification code

 *****3210

I received my verification code

 You can verify your account here by using the code we sent you.

OR

Enter your verification code ➡



Verify your account

Enter the verification code we sent you.

*Indicates required field

Verification code*

Didn't get a code? [Request a new verification code.](#)

If you're a new HSA member, you'll need to complete a few steps to set up your HSA.



Step 1 of 3: Fees and Agreements

Review your fees and agreements.

*Indicates required field

Fee	Amount
	\$0.01 - \$25,000.00 0.02%
HIA - Asset Based Fee ?	\$25,000.01 - \$50,000.00 0.02%
	Over \$50,000.01 0.00%

Review the [HSA Custodial Agreement](#)

☒ I have received, read, understand and acknowledge the terms of the agreements, including the fees.*

Your initials*

SAVE AND CONTINUE

Continued - new HSA member set up



LOGIN

Set up your HSA



Step 2 of 3: Personal Information

Complete all required fields.

*Indicates required field

Name

James Smith

Address

123 Main Street
Anywhere, USA 55555

Social security number

XXX-XX-1234

Date of birth

04/01/1985

Martial status*

Single

High deductible health plan start date*

01/01/2025

Under Internal Revenue Service (IRS) regulations, the high deductible health plan (HDHP) start date helps determine when an HSA can be opened and how much you can contribute to your HSA. You or your employer provided an HPHP start date shown above. If you were enrolled in an HPHP prior to this date, you should update your HDHP start date on this page. Inspira Financial is not responsible for determining the accuracy of this information.

High deductible health plan coverage* ?

Single coverage

SAVE AND CONTINUE

Continued - new HSA member set up



Step 3 of 3: Beneficiaries

Add a primary beneficiary

You can name a person, trust or your estate as your primary beneficiary for your HSA. The primary beneficiary will receive any remaining balance in your HSA after your death. You can have more than one beneficiary. If you do, you'll need to assign percentages to each beneficiary. The percentages determine the amount each beneficiary will receive from your HSA.

You can also name a contingent beneficiary. A contingent beneficiary receives your HSA balance if your primary beneficiaries are deceased at the time of your death. If you need to make changes later, you (the account holder) can do it in Account Settings.

*Indicates required field

Select your primary beneficiary *

Select type of beneficiary▼

—

Beneficiary terms

- If all of my beneficiaries predecease me, my HSA funds will be paid to my estate.
- If my spouse is my beneficiary and receives my HSA, they may choose to continue the HSA in their name. This is subject to the HSA Custodian's consent. My spouse must also provide a written election, sign the forms and provide the required information to the HSA Custodian to open an HSA with Inspira Financial.
- If my beneficiary is not my spouse, the HSA terminates as of my date of death and any remaining balance is paid to my beneficiary(ies).
- I understand that in certain states, my spouse's consent may be necessary if I wish to name a person as my beneficiary other than or in addition to my spouse. I also understand that I should consult with my attorney before making this type of beneficiary designation.
- By name a beneficiary, I present and warrant to the HSA Custodian that this beneficiary designation satisfies all legal requirements under applicable law and, on behalf of myself, the beneficiary or beneficiaries, my heirs and my estate, I hereby indemnify and hold the HSA Custodian harmless from and against any and all claims, damages, liabilities, and costs (including attorney's fees) arising as a result of the Custodian's payment of my HSA balance in accordance with this beneficiary designation.
- The HSA Custodian may ask my beneficiary(ies) for proof of identity and entitlement to payment before making a final payout from my HSA.

SAVE AND CONTINUE

Continued - new HSA member set up



LOGIN

Set up your HSA



Step 3 of 3: Beneficiaries

Add a primary beneficiary

You can name a person, trust or your estate as your primary beneficiary for your HSA. The primary beneficiary will receive any remaining balance in your HSA after your death. You can have more than one beneficiary. If you do, you'll need to assign percentages to each beneficiary. The percentages determine the amount each beneficiary will receive from your HSA.

You can also name a contingent beneficiary. A contingent beneficiary receives your HSA balance if your primary beneficiaries are deceased at the time of your death. If you need to make changes later, you (the account holder) can do it in Account Settings.

*Indicates required field

Select your primary beneficiary *

Person

Beneficiary first name *

James

Beneficiary last name *

Smith

Address *

123 Main Street

Address line 2

Address line 2

City *

Hartford

Country *

United States

State *

Connecticut

Zip code *

06516

Social security number *

555-55-5555

Relationship *

Single

Phone number

555-555-5555

Date of birth

04/01/1985



Continued - new HSA member set up



LOGIN



Set up your HSA

Step 3 of 3: Beneficiaries

My beneficiaries

Success! You've named a beneficiary for your HSA.

You may add ,change or remove your beneficiary at any time prior to your death.

[Add a primary beneficiary](#)

[Add a contingent beneficiary](#)

Primary Beneficiary	Percentage ?	
Jackie Smith	100%	Edit
Total: 100%		

SAVE AND CONTINUE

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Continued - new HSA member set up



LOGIN



Set up your HSA

HSA set up summary

 Print

Here's the information you entered for your HSA. You can update it at anytime through Account Settings.

Personal information

Name

James Smith

Address

123 Main Street
Hartford, CT 06516

High deductible health plan start date

01/01/2025

High deductible health plan coverage

Single plan

My beneficiaries

Primary beneficiaries

Name	Social security number	Relationship	Percentage
Jackie Smith	XXX-XX-5555	Other	100

Find out how much you can contribute

Each year the Internal Revenue Service (IRS) sets annual contribution limits for HSAs. These limits are based on your HDHP coverage level (self-only or family). Any they are subject to annual change. You can find the contribution limits on the [U.S. Department of Treasury website](#).

SAVE AND CONTINUE

You'll see this screen after you successfully complete registration

