

OPENING YOUR HEALTH SAVINGS ACCOUNT ONLINE

1

Visit forumcu.com/openaccount and choose **Open Now** next to **Health Savings Account (HSA)**.

2

Are you an existing member?

NO: Select **Basic Savings, Health Savings and Apply Now**

YES: Select **Health Savings and Apply Now**

3

Create an **Online Profile** or **Continue as Guest**.

4

Select **Yes** next to **Did you hear about FORUM through your employer?** and choose **Your Employer's Name** _____ from the **Select Your Employer** drop down. Answer **No** to all other qualifying questions and **Continue**.

5

Complete the **application**, **Confirm** all of your information and **Submit**. *If your application goes into review, a FORUM Representative will contact you within 2 business days.*

6

Complete **beneficiary information**.

7

Receive **Encrypted and Secure Email**. *You will receive a secure email with account information including your account number and important forms. No signature is necessary. These documents are just for your records.*

8

Set up **CU Online Access**.

9

Receive **Debit Card and PIN** in 7-10 business days (*will arrive separately*) or schedule an appointment to pick up at the nearest branch.

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