

OptumHealth Financial Services Broker Sales Notification Form: HSA, FSA, HRA

Lovelace Health Plan has selected OptumHealth Financial Services to provide administration of health savings accounts, flexible spending accounts and health reimbursement accounts (HSAs, FSAs and HRAs) that complement high-deductible health plans to help people plan, save and pay for health care. OptumHealth Financial Services (OHFS) offers industry-leading consumer education for employers to engage employees to become health-wise consumers; convenient online account management for employers and account owners; dedicated implementation managers for smooth adoption of health accounts; and friendly, knowledgeable customer service representatives. OHFS is known for their innovative tools and outstanding service and we believe they are uniquely positioned to provide the same level of quality that our clients have come to expect from Lovelace Health Plan

Working with you, OHFS creates a seamless transition for your clients. This effort encompasses the following services:

1. Designate an Installation Specialist and an Account Manager to service your set-up and administration needs.
2. Compile all data for plan and participant specifics to ensure all required information is transmitted to accomplish a smooth transition.
3. Work with your staff to determine an appropriate timeline for the transition.
4. Prepare communication materials for new plan sponsors and participants including:
 - Notification that OHFS is the Plan supervisor
 - Name, address and phone number of Account Manager
 - Instructions for transmitting participant information
5. Provide Plan Sponsor with access to the OHFS website.

Please provide the following information and submit this form to the Sales Support Team at OptumHealth Financial Services via e-mail at: insidesalesnortheast@optumhealthfinancial.com

Broker Name: _____

Broker Contact Person: _____

Broker Address: _____

Broker Phone Number: _____

Broker E-mail: _____

Plan Sponsor Company Name: _____

Products (check all that apply):

HSA

FSA

HRA

Desired Plan Effective Date: _____

OptumHealth Financial sales representative will contact you within 24 hours to initiate the installation process.

Thank you!