



**STERLING HSA®**

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# Health Savings Accounts Sterling Service Packages & Fees

Sterling HSA delivers a simple, reliable and personal approach to paying for health care while saving for the future. Our services include:

- Education about HSAs and assistance with account set-up.
- Collection and accounting of individual and employer contributions and investment returns.
- Payment of qualified medical bills, if requested by the accountholder. Record keeping of transactions in case of IRS audit.
- A choice of investment options through well-known financial institutions.
- Personalized customer service via phone, email, fax or mail.
- Quarterly account statements for HSA accountholders and employers.
- Money Back Guarantee. If for any reason our accountholders become dissatisfied with Sterling HSA services, we will refund to them monthly account management fees paid up to one year.

## Choose from Two Service Packages – Standard & Value Plans

1. **Sterling Value Plan** – Offers a menu approach to select the services most important to Sterling HSA accountholders. Clients pay fees on a per service basis.
2. **Sterling Standard Plan** - Our most complete range of administrative services for a monthly fee.

## Fee Schedule Comparison

PRIMARY SERVICES	STANDARD PLAN	VALUE PLAN
<b>MONTHLY MANAGEMENT FEES</b>	<b>\$8.75</b>	<b>\$2.50</b>
<b>Online Transactions</b>		
Contributions & Disbursements*	Included	Included
Access/View Account Activity Statements	Included	Included
<b>Medical Bill Paying</b>		
Online Bill Paying	Included	Included
Disbursement Requests by Fax or Email (per check)	Included	\$5.00
Medical Bill Review	Included	Included
Scan/Archive Medical Bills	Included	Included
<b>Debit Card Fees</b>		
Card Issuance for Accountholder	Included	\$5.00
Card Issuance for One Additional Dependent	Included	\$5.00
Card Issuance for 3rd Card or More (per card)	\$10.00	\$10.00
Usage (per transaction)	Included	\$1.50

*All fees listed are per account. Other fees may apply beyond the core services listed above. Please see additional information at [www.sterlinghsa.com](http://www.sterlinghsa.com) or ask your sales representative for details.*