

## Granting Marvell Permission to Transfer your HSA from Navia to Health Equity

- 1) Log into your personal [Navia Benefits portal](https://www.naviabenefits.com/) at <https://www.naviabenefits.com/>.
- 2) Once logged in, look through the tools section at the top of the screen and select **Access My HSA**.



- 3) Once on your personal dashboard, you'll see a note on top stating, "Do you have more than one HSA?", click on the **EASY HSA TRANSFER** button.

Choose which account to view (Accounts of Selected Period will be Populated)

Current ▾

Do you have more than one HSA? Transferring your other HSA balance and combining all of your HSA funds into one account is quick and easy – and can save you money. Click the Easy HSA Transfer link to get started today!

[EASY HSA TRANSFER >](#)



- 4) You'll be taken to the 'Select Your Account' page where you'll select, **UMB Health Savings Account** from the dropdown menu. Click **Continue**.

Transfer of Assets Authorization

Select your bank > **Select your account** > Authorize Transfer > Confirmation

You are on step 2 of 4

On this screen, you direct UMB to close your UMB HSA account and transfer the funds to your new HSA account. Please select your UMB HSA account from the drop-down menu below and click 'CONTINUE'.

Note: If you do not wish to transfer and close your UMB HSA you should exit this application now.

Health Saving Account: **UMB Health Savings AC...**

CONTINUE

- 5) From there, you'll land on the "Authorize Transfer" page, where you can either grant Marvell permission to transfer your HSA or opt-out of Marvell's transfer. Once you confirm your approval you will be taken to a confirmation page which will show you have completed this process.

Transfer of Assets Authorization

Select your bank > Select your account > **Authorize Transfer** > Confirmation

You are on step 3 of 4

Transfer of Assets Authorization

You may use this electronic form to authorize the transfer of your entire HSA balance from UMB Bank to a new custodian HSA, HealthEquity and subsequent closure of your UMB HSA. This transfer will take place during a blackout period beginning 3/24/23 through 4/7/23, during which time you will not have access to your UMB HSA balance. UMB will transfer the funds on 4/4/23, and your complete balance will be available through your new HealthEquity HSA by 4/7/23.

Marvell Semiconductor, Inc. ("Employer") has designated HealthEquity, the name of your new HSA custodian, as the sole HSA provider to which it will forward contributions beginning 1/1/23. Employer will open an account in your name at HealthEquity and no further contributions will be made to your UMB HSA. Please read the information below carefully. By checking the box below, you are certifying you have read the information below and are directing UMB to transfer the balance of your HSA funds from UMB to HealthEquity.

Transfer and Account Closure Authorization:

I request that UMB Bank, n.a. ("UMB"), as custodian of my HSA, close my HSA maintained at UMB and transfer the balance of the funds in my HSA, after deduction of necessary fees and expenses, to HealthEquity, 15 West Scenic Pointe Dr, Ste 400, as successor custodian, effective on the date UMB transfers my funds to HealthEquity, which will be no later than 4/4/23. I understand that I will not have access to my UMB HSA funds from the evening of 3/24/23 until the transfer to HealthEquity has been completed by 4/7/23. If funds from my UMB HSA have been invested, I understand I must liquidate such investments prior to 3/14/23 in order for UMB to transfer my account balance to HealthEquity. I understand that I am responsible for the tax consequences of these actions and I will not seek to hold UMB responsible for such tax consequences. I indemnify and agree to hold UMB harmless against any liabilities for following these instructions. I certify that all information provided by me to my Employer as part of this request is true, correct and complete.

If you do not check this box, your UMB HSA will not be closed and the balance of your UMB HSA will not be transferred to HealthEquity. If you do not liquidate any investments in your UMB HSA by 3/14/23, even if you have checked this box, your UMB HSA will not be closed and the balance of your UMB HSA will not be transferred to HealthEquity.

I direct UMB Bank, n.a. to transfer my funds from my Navia UMB HSA into my new HSA at Health Equity.

Do not wish to transfer my funds into a new HSA.