

HSA Transfer Final Reminder

To: State of Wisconsin employees
From: TASC
From Email: etf-service@tasconline.com
Subject: **HSA Transfer Final Reminder**



Hi {{First name}},

This is a final reminder regarding your HSA assets transfer.

If you plan to transfer your Optum Financial (Optum) Health Savings Account (HSA) assets to TASC for 2026 plan year, please submit your HSA Assets Transfer Form on December 29, 2025, or any time after that. To ensure all 2025 HSA contributions are fully paid out by your employer, do not submit the transfer form before December 29, 2025.

To complete the asset transfer, you must submit the transfer form to Optum and ensure that all investments have been properly liquidated. If you did not have any investments in your Optum HSA, you can simply submit the transfer form.

Instructions for liquidating investments and completing the required steps can be found on the [TASC microsite](#). If you have any questions, please contact TASC Customer Care:

- Phone: 1-888-276-3147
- Email: etf-service@tasconline.com