

Maximize your health savings with WEX



Why choose a WEX Health Savings Account (HSA)?

A WEX Health Savings Account offers a robust way to save for healthcare costs while providing the flexibility to use your funds for current or future healthcare needs. It's not just an account, but an investment in your well-being.

Features of WEX HSA

- **Triple Tax Advantages:** Contributions, earnings from investments, and withdrawals for eligible expenses are all tax-free.
- **Investment Opportunities:** Invest your funds in a variety of options, from a simple interest-bearing account to over 8,500 mutual funds and bonds through a brokerage account powered by Charles Schwab.
- **Flexibility and Control:** Unused funds roll over year to year and remain yours forever, even into retirement. After age 65, funds can be used for any expense without penalty.
- **Easy Access:** Manage your account seamlessly via our mobile app, with features like smart scan for claims, instant balance checks, and security features for safe transactions.

Investment with ease:

- **Automated Investing:** Set your investment preferences to automatically transfer funds from your cash account to investment options, simplifying your financial management.
- **Custom Investment Thresholds:** Choose when to start investing by setting a custom threshold, ensuring that enough funds are available for immediate needs.

Engagement and education:

- **Consumer Pathways:** This program educates and engages users in understanding the long-term benefits of their HSA, encouraging increased contributions and informed decision-making.
- **Easy Transition:** Changing health plans? No problem. Your HSA remains with you, uninterrupted, regardless of changes in your health insurance.

Security and convenience on the go:

- **WEX Mobile App:** Our free app provides secure, real-time access to all your benefits information. You can manage accounts, file claims, and even lock a lost card directly from your phone.
- **Innovative Tools:** Utilize the My HSA Planner and Consumer Pathways to receive personalized guidance and recommendations, helping you make the most of your HSA.

Eligible expenses

Cover a wide range of healthcare needs from copays and medications to dental and vision care. Explore a comprehensive list of eligible expenses on our website.

Getting started

Eligibility for a WEX HSA requires enrollment in a high-deductible health plan (HDHP). You cannot be claimed as a dependent on someone else's tax returns or be covered by other disqualifying health plans like Medicare or a medical FSA.

Choose WEX for comprehensive and convenient health Savings



My HSA
Planner



Why should
I get a HSA?

wex™

