

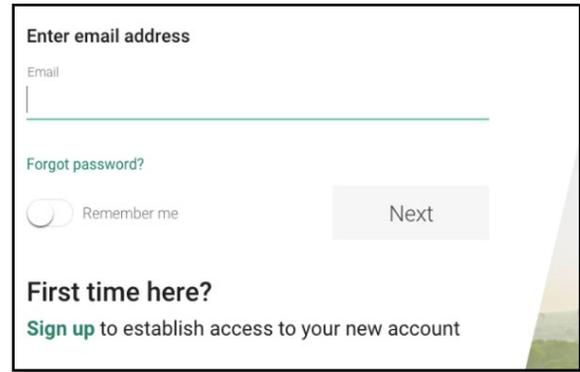
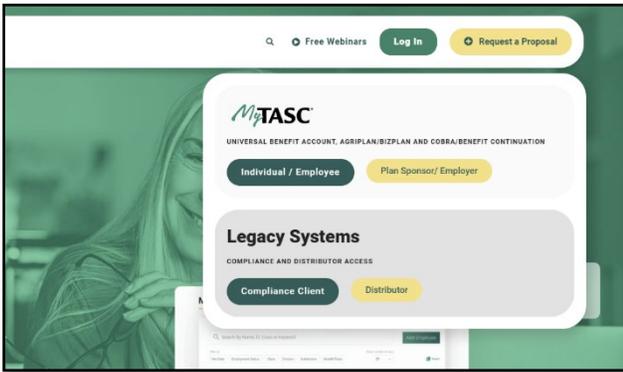


ADDING BENEFICIARIES

Account Access

Go to www.tasconline.com and click the **Log In** button on the menu bar, then click the **Individual / Employee** option below the MyTASC logo. This will take you to the page where you will sign in. Before you can sign in for the first time, you must complete a few sign-up steps. Under **First time here?** click the green **Sign up** link. Enter your email address (the same one you used for enrollment) and create a password, then follow the on-screen instructions to complete the process.

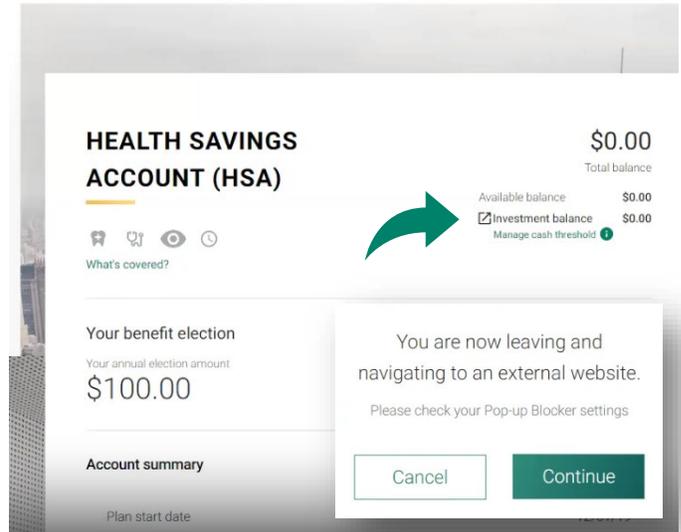
► **NOTE:** You do not need to be investing funds from your HSA in order to add a beneficiary in the Schwab Retirement Technologies (SRT) investment portal. All HSA participants have access to this functionality in SRT.



Navigating to SRT

For enhanced security, TASC provides Single Sign-On (SSO) functionality for investment-related benefit accounts. Select *Benefit Accounts* from the top navigation bar and choose your benefit plan from the drop-down menu. Then, click the green *Investment Balance* link on the next screen.

You will get a warning stating that you are now leaving TASC and navigating to an external website. Click on *Continue* to proceed to the SRT investment portal.



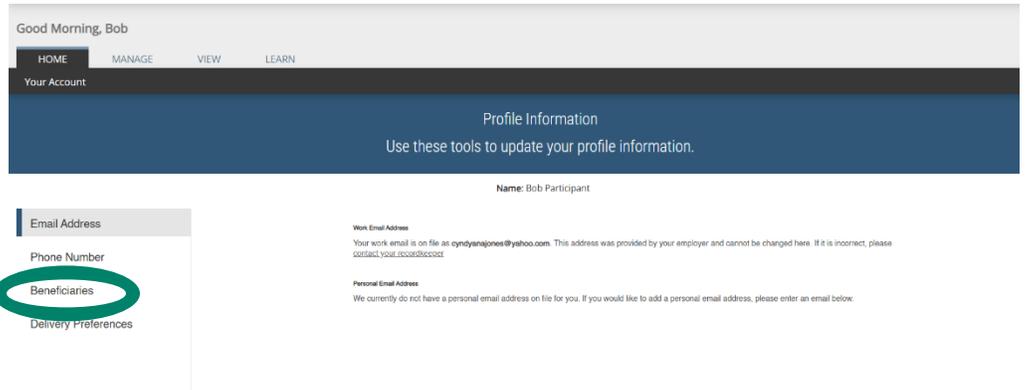


Adding a Beneficiary

In SRT, click on MY PROFILE in the upper right corner of the page.

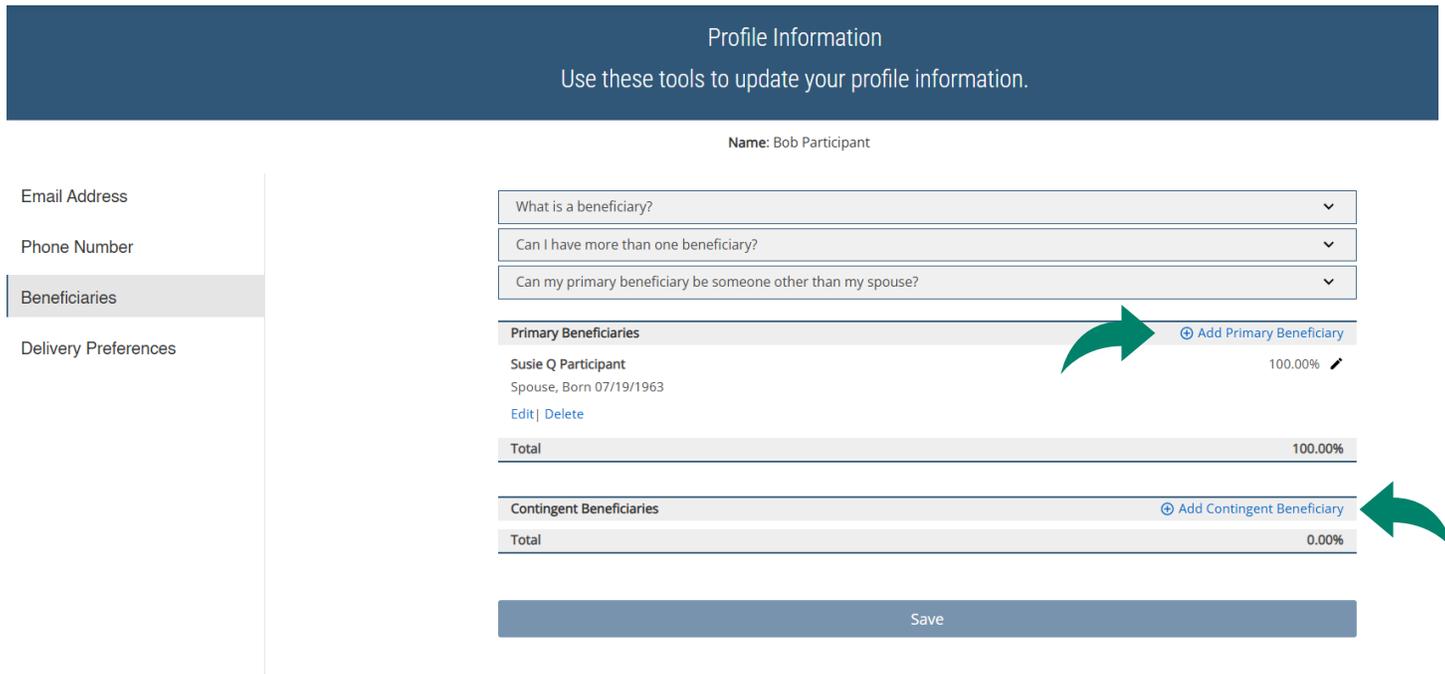


Next, select BENEFICIARIES from the left menu.



From there, you may add a PRIMARY or CONTINGENT beneficiary by selecting those options.

- ▶ **NOTE:** Florida HSA accountholders are not required to obtain written consent from their spouse if they are married and designating someone other than their spouse as their primary beneficiary.





The beneficiary information entry fields will then appear below your selection.

Contingent Beneficiaries	+ Add Contingent Beneficiary
Total	0.00%

Primary

This Beneficiary Is a Trust/Estate/Charity

Foreign Address

Allocation Percentage (Required)
%

Relationship (Required)
Select

First Name (Required)

Middle Initial

Last Name (Required)

Social Security Number

Confirm Social Security Number

Date of Birth (Required)

Address 1

Address 2

City/APO/FPO/DPO

State/Province
None

ZIP Code

Phone Number

After you have completed all entry fields, the CONTINUE button will change from grayed out to green in color. Click CONTINUE to proceed to the confirmation page.



Review and confirm that the data you entered is correct, then click SAVE.

Can my primary beneficiary be someone other than my spouse?

⚠ You have unsaved changes. When you're done making changes, use the Save button to submit them.

Primary Beneficiaries		+ Add Primary Beneficiary
Susie Q Participant	100.00%	
Spouse, Born 07/19/1963		
Edit Delete		
Total	100.00%	

Contingent Beneficiaries		+ Add Contingent Beneficiary
Total	0.00%	

Save

After the data is saved, the beneficiary information is visible on your Profile Information page. You may update or change beneficiary information at any time.

Your Account

Profile Information
Use these tools to update your profile information.

Name: Bob Participant

Email Address	What is a beneficiary?
Phone Number	Can I have more than one beneficiary?
Beneficiaries	Can my primary beneficiary be someone other than my spouse?
Delivery Preferences	

Primary Beneficiaries		+ Add Primary Beneficiary
Susie Q Participant	100.00%	
Spouse, Born 07/19/1963		
Edit Delete		
Total	100.00%	

Contingent Beneficiaries		+ Add Contingent Beneficiary
Total	0.00%	

Questions?

Contact us at 608-241-1900 or call toll-free 800-422-4661 or submit a support request through your online account.