

**Subject line:** Important account balance information

**Preheader:**



Dear [First name]:

We want you to make the most of your benefits. Below is a snapshot of your plan year-to-date (YTD) account details and deadlines. If you still have funds available, you may want to consider using any balance over \$610. Up to \$610 of unused flexible spending account (FSA) funds will roll over into 2024. To automatically receive the balance carryover for your FSA, you must have a balance of \$50+ in your account on December 31, 2023 (or by the end of the run-out period), and no enrollment is required for 2024. Any balance less than \$50 by the end of the run-out period requires a new election for the funds to be carried over. If there is not a new election made for remaining funds less than \$50, the funds will be subject to forfeiture.

**Account details for [Account type] as of [CODER TO ADD DATE HERE]**

- Annual election: [\$Election]
- Plan year-to-date contributions: [\$ER +EE Contributions]
- Plan year-to-date claims paid: [\$Claims]
- Available balance: [\$Available]
- Deadline to incur claims: Dec. 31, 2023
- Deadline to submit claims: March 31, 2024
- Plan year: Jan. 1, 2023–Jan. 1, 2024

**Make payments easily with your card**

Your payment card is a simple way to pay for eligible expenses. Keep it handy for in-person, online and phone payments. You can also use it to shop in the Optum Store at [store.optum.com](https://store.optum.com), where everything is FSA-eligible.

**Save your documentation**

It is a best practice to save your explanation of benefits or itemized receipt from the merchant, health care provider, or your health plan that describes the service or the expense details in case you need to provide it to verify eligible purchases at a later date.

**Manage your account**

For your account details, account activity, payment and reimbursement requests, or to chat with Customer Care, sign in to your account using the [Optum Financial Mobile App](#) or at [myoptumfinancial.com/etf](https://myoptumfinancial.com/etf).

Sincerely,  
Customer Care  
Phone: **1-833-881-8158**  
Available 24/7

Flexible spending accounts (FSAs) are administered on behalf of your plan sponsor by ConnectYourCare, LLC, a subsidiary of Optum Financial, and are subject to eligibility and restrictions. Please contact a legal or tax professional for advice on eligibility, tax treatment, and restrictions. Please contact your plan administrator with questions about enrollment or plan restrictions. This communication is not intended as legal or tax advice. Federal and state laws and regulations and the design of your plan are subject to change.