



Set up for Easy Choice

Step One Get signed up on *File Secure*.

Supply the company name and primary person(s) along with the email address to:

hsa@choicefinancialgroup.com

An email confirmation will be sent back indicating your user name and password for *File Secure* along with the link to login.

Step Two Make an excel spreadsheet exactly how you see it below. A Choice Financial employee can help you get this started. This information is required for all employees. Because of the importance of this file, operations are not allowed to manipulate it in any way so all information must be complete and correct.

Example

Name	Account Number	Amount	Your Company ID	Routing Number	Tran Code
Employee	6600XXXXXX	\$	200722	091302966	22

Do not total the amount column on this spreadsheet rather include the total contribution amount and effective date in the **comments section** of *File Secure*.

Step Three Upload the excel spreadsheet to *File Secure*. Once Choice Financial receives the spreadsheet and the dollars (Step Four) it is uploaded into our core software and gets posted automatically to each employee's HSA.

Step Four Send the funds to Choice Financial by wire, check, or ACH Transfer.

Below is the information for a wire or ACH. Wires must be received by 2:30pm CST in order to be processed the same day your contribution spreadsheet is received.

Beneficiary Information:	Choice Financial Group
Routing Number/ABA:	091302966
Account Number:	121108383
Account Name:	CFG-HSA Clearings Account

Email questions to: hsa@choicefinancialgroup.com