



Savings prioritization

Helping employees make more informed health savings account (HSA) and retirement savings decisions



Powered by Fidelity®'s proprietary methodology, savings prioritization provides suggestions to maximize saving opportunities.



What it does

- Provides a proactive HSA contribution suggestion for all HSA owners
- Offers suggestions to help save in both an HSA and any available retirement accounts in the most tax-advantaged way
- Provides consistent direction across the personal and workplace journey experiences



Savings logic

- Save for your deductible or eligible health care expenses
- Capture available employer match (if applicable)
- Maximize HSA contributions
- Maximize retirement savings



Employee advantage

- Proactive suggestions
- Encourages action
- Helps to maximize tax advantages
- Supports financial wellness

Keep in mind that investing involves risk. The value of your investment will fluctuate over time, and you may gain or lose money.

For plan sponsor use only.

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