



FACTS	WHAT DO WE DO WITH YOUR PERSONAL INFORMATION?
Why?	Financial companies choose how they share your personal information. Federal law gives consumers the right to limit some but not all sharing. Federal law also requires us to tell you how we collect, share, and protect your personal information. OneBridge Benefits Inc. is an IRS-approved passive nonbank trustee providing HSA custodial services for your HSA. Please read this notice carefully to understand what we do.
What?	The types of personal information we collect and share depends on the product or service you have with us. This information can include: • Social Security number and name, address, and other personal information • Medical and employment information • Account balances, account transactions, and payment history When you are no longer our customer, we continue to share your information as described in this notice.
How?	All financial companies need to share customers' personal information in providing applicable services to customers. In the section below, we list the reasons financial companies can share their customers' personal information, the reasons we choose to share, and whether you can limit this sharing.

Reasons we can share your personal information	Do we share?	Can you limit this sharing?
For our everyday business purposes — such as to process your transactions, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	Yes	No
For our marketing purposes — to offer our products and services to you	No	We don't share
For joint marketing with other financial companies	No	We don't share
For our affiliate's everyday business purposes — information about your transactions and experiences, which is not used by affiliates to market their products to you	No	We don't share
For our affiliate's everyday business purposes — information about your creditworthiness	No	We don't share
For our affiliate to market to you	No	We don't share
For nonaffiliates to market to you	No	We don't share

Questions?	For questions regarding this Notice, please call 888-865-1628 or visit onebridgebenefits.com
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Who we are

Who is providing this notice?	OneBridge Benefits Inc., your HSA non-bank trustee
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What we do

How do you protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include computer safeguards and secured files and buildings. We maintain physical, electronic, and procedural safeguards to protect your nonpublic personal information, including restrictions on access to your confidential information.
How do you collect my personal information?	We collect your personal information, for example, when you: • Open an account or make deposits to or withdrawals from your account • Use your debit card • Use our web site or portal • Give us your contact or employment information We may also collect your personal information from others, such as your employer, the Social Security Administration, and public records to comply with government requirements to know our customers.
Why can't I limit all sharing?	Federal law gives you the right to limit only: • Our sharing for affiliates' everyday business purposes regarding information about your creditworthiness • Affiliates from using your information to market to you • Sharing for nonaffiliates to market to you State laws and individual companies may give you additional rights to limit sharing.

Definitions

Affiliates	Companies related by common ownership or control. They can be financial and nonfinancial companies. • Our affiliate is OneBridge Agency LLC, a nonfinancial company.
Nonaffiliates	Companies not related by common ownership or control. They can be financial and nonfinancial companies. • We do not share with nonaffiliates to market to you.
Joint marketing	A formal agreement between nonaffiliated financial companies that together market financial products or services to you. • We do not engage in any joint marketing.