

2025 Customer Communications Calendar

	Type	J	F	M	A	M	J	J	A	S	O	N	D
Tax notification: 1099-SA available	Required												
Devenir Transfer-in-Kind (TIK) Emails	Required												
Tax notification: 5498-SA available	Required												
Onboarding 30/60/90 Emails (3 emails)	Standard												
Medicare and your HSA (63 1/2, 64, 64 1/2)	Standard												
Prior Year Catch-up	Standard												
Beneficiary	Standard												
Balance Transfer	Standard												
Mid-Year Check-in	Standard												
HSA Invest Education	Standard												
55+ Catch-up Contribution	Standard												
High Spender Targeted Email	Standard												
End of year Contribution	Standard												



As of April 2, 2025. Timing and topics are subject to change. Certain emails may not apply to all accountholders.