TRANSITIONING TO SURENCY

Surency FLEX

WHAT IS THE PROCESS AND WHAT DO I NEED TO KNOW?

It sure is easy.

Your Flexible Spending Account (FSA) will be moving from your current administrator to Surency Flex.

TAKE ACTION

- Check to see if you have funds remaining in your account with your current administrator. If so, you will have two options:

1. CURRENT ADMINSTRATOR FINAL FILING DATE
Incur and submit claims for reimbursement to your current administrator through the **Current Administrator Final Filing Date**. See below.

After the Current Administrator Final Filing Date, if you have a remaining balance with your current administrator, your account balance will be transferred to Surency.

2. BEGIN FILING DATE WITH SURENCY
Incur and hold your claims and turn in to Surency for reimbursement after the **Begin Filing with Surency Date.** See below.

BLACKOUT PERIOD

- Your claims can still be incurred but cannot be filed with either administrator. You can file claims with Surency after the **blackout period** ends.

CARRYOVER, GRACE PERIOD AND FILING LIMITS FROM CURRENT PLAN YEAR

- Between your **Current Administrator Final Filing Date** and **Begin Filing Date with Surency Date**, your former administrator will send Surency your remaining balance from your current Plan Year. After the **Begin Filing Date with Surency Date**, these funds will be available. Surency will then administer your Carryover or Grace Period (if applicable) and Filing Limits for the current Plan Year.

BENEFITS CARD

- You will be given a final date to utilize your current debit card (if applicable). You will be issued a new Surency Flex Benefits Card to access your Surency account.

IMPORTANT DATES:

Current Administrator Final Filing Date:	Begin Filing with Surency Date:	Blackout Period:
12/31/2026	1/07/2027	12/31-1/7

QUESTIONS? Call Surency at 866-818-8805 or email flex@surency.com

Surency Flex is administered by Surency Life & Health Insurance Company.
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