

## KEY EVENTS AND DATES – EMPLOYERS

<b>By 11/15/2023</b>	<b>Employers will be asked to provide updated addresses and contact information for participant accounts – DFS will provide a method for importing this information.</b>
<b>Starting 11/15/2023</b>	<b>NATSD resignation letter will be mailed. Email notifications begin. These will provide information about upcoming events, including these key dates.</b>
<b>12/1/2023</b>	<b>Account owners may receive an email asking them to update contact information to help ensure successful communications going forward.</b>
<b>12/18/2023</b>	<b>If the account owner does not wish to have DFS as their account custodian, this is the last day to close or transfer their account. (Automatic conversion if they do nothing.)</b>
<b>12/18/2023</b>	<b>Deadline for Employer Groups to transfer their HSA accounts if they do not wish DFS to become their custodian. (Otherwise, conversion to DFS will be automatic.)</b>
<b>12/21/2023</b>	<b>Last day to invest until the custodial conversion has been completed.</b>
<b>12/22/2023</b>	<b>Investment blackout period begins. Online investing is disabled until 1/2/2024 to allow NATSD to transfer investment balances to DFS. Contributions received during the blackout period will post automatically to savings balances.</b>
<b>12/29/2023</b>	<b>Last day that contributions can be entered until the conversion has been completed. 2024 contributions – forwarded to DFS automatically 2023 contributions – posted to NATSD automatically</b>
<b>12/30/2023</b>	<b>CONVERSION WEEKEND. Full blackout of all HSA services until 1/1/2024.</b>

**1/2/2024** All blackout periods end.

**1/2/2024** Account Owners regain access to all of their balances, including savings and investments.

**1/2/2024** All account administration functionality is available, including investment options.