

Where do you want to *grow*?

summit HSA

Summit HSA provides comprehensive features for administrators, employers, and participants alike. With Summit, TPAs can offer hands-on, professional account management services with built-in investment options – a level of service many banks won't offer.

DataPath®



No Need for Multiple Vendors

Summit is a 'one-stop shop' for full HSA management with integrated account administration, banking, and investments. DataPath even maintains the custodial banking relationship.



Hand-off Administration

TPAs can provide as much or as little management as they like. For example, you can turn off MCC restrictions and allow participants to self-adjudicate purchases. Or be more hands-on and offer your expertise to account owners.



Online Enrollment and Elections

Participants can use Summit's online portal to enroll in their HSA and make elections in just a few quick steps.



Easy HSA Rollovers

At any time, account owners may roll over an HSA from a different custodian. Funds will show in their account balance within 2-4 weeks after DataPath receives the transfer form.



Fully Integrated Banking

Summit is fully integrated with DataPath's custodial bank – providing full visibility into the accounts and reporting.



Investing Made Easy

Summit features integrated investing, with investment options and educational materials available right in the portal. DataPath's in-house Registered Investment Advisor selects and maintains investment options and model portfolios to help participants maximize their investment earnings.



Plan Document Templates

Summit includes compliant plan document templates that TPAs can customize, or upload and share your own. You can also perform nondiscrimination testing in the portal.



Debit Card, Participant Portal, Mobile App

Every Summit HSA account comes with a convenient debit card, user-friendly participant portal, and full-featured mobile app that can be used to update information, check balance, upload receipts, management investments and more directly from their mobile devices.

DataPath®
grow

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