

HealthEquity

BROKER PORTAL OVERVIEW



HealthEquity's broker portal makes managing clients and groups easy.

Our broker portal has the tools and resources to make your job easier and provide you with even more ways to better serve your clients and groups. You can:

- Manage your groups' health accounts
- Generate reporting for individual groups and your book of business
- Access regional health plans' sales materials
- View quick stats on number of groups and number of lives
- Provide URL links to enroll clients (one for individuals, one for employers)
- Receive individual agent ID number to tie all clients and groups together
- If receiving referral fee payments, you can view/print quarterly statements
- Use single sign on access to employer portals

How to register for the broker portal

It's quick, easy and free

1. Visit [HealthEquity.com/brokers](https://www.healthequity.com/brokers)
2. Select 'Register as a broker'
3. Complete the 'Verification Step'
4. Verify you are a registered insurance agent
5. Enter your contact information and complete the process



HealthEquity[®]

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If you have any questions about registering as a broker with HealthEquity, or if you would like to learn more, please call us at:

866.260.9441

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