

ACCESSING YOUR ACCOUNT FUNDS



USING YOUR SURENCY FLEX ACCOUNT HAS NEVER BEEN EASIER

It sure is easy.

Your **Surency Flex Benefits Card** is a special-purpose Visa® Card that gives you an easy, automatic way to pay for eligible expenses. The Benefits Card lets you electronically access the pre-tax amounts set aside in your Surency Flex accounts. Use it when paying for eligible expenses at a provider or merchant that accepts Visa Cards and uses an inventory control system. These transactions may be automatically substantiated, meaning you don't have to file a claim and may not have to submit a receipt. However, always keep all documentation for tax purposes or in case Surency requests further documentation.



HOW TO USE YOUR BENEFITS CARD

1. Have the cashier ring up all of your items together.
2. When it's time to pay, swipe your Surency Flex Benefits Card first. Select 'credit' and sign for your purchase. *Optional: In addition to your signature, you can set up a PIN number to access your funds by calling 866-898-9795. If you have a PIN number, select 'debit' and enter your PIN.*
3. All eligible expenses will be paid for from your account and deducted from your total.
4. If you are purchasing non-eligible items, you will need to have a second form of payment available for those items.
5. Keep your receipts in the event that further validation is needed.

DID YOU PAY OUT-OF-POCKET FOR AN ELIGIBLE EXPENSE?

Submit a claim to get paid back using money from your account. There are three ways to submit a claim:

- | | | |
|--|--|---|
| 1. SURENCY FLEX APP
Download the Surency Flex mobile app and submit the claim by taking a photo of your receipt. | 2. MEMBER ACCOUNT AT SURENCY.COM
Log into your Member Account at Surency.com to upload your receipt. | 3. PAPER CLAIM FORM
Visit Surency.com to download a paper claim form. Complete and return to Surency. |
|--|--|---|

WANT TO GET PAID BACK AUTOMATICALLY?

Sign up for Direct Deposit and after you submit a claim, Surency will automatically deposit those dollars back into your bank account. There are two ways to set up Direct Deposit:

- | | |
|--|---|
| 1. MEMBER ACCOUNT AT SURENCY.COM
Log in to your Member Account at Surency.com to input bank information. | 2. PAPER DIRECT DEPOSIT FORM
Visit Surency.com to download a Direct Deposit form. Complete and return to Surency. |
|--|---|

KEEP YOUR CARD! If you have an account next year, you will be able to continue to use the same Surency Flex Benefits Card. We will issue you a new one when your current card expires.

866-818-8805 • Surency.com