



# HSA - Health Savings Account Application and Eligibility Form

\*The Trustee for the HSA Account will be HSA Bank, Sheboygan, WI

Please return this form to your Employer

Employee Name:		
Social Security Number:	DOB:	Phone#:
Street Address (No PO Boxes):		
City:	State:	Zip:

**Instructions:** All fields must be completed. For assistance call (800)-447-1690. Return this application to your Human Resource Department or your Employer.

**Form of Identification**

Driver's License	State ID	Passport	ID#
Email Address (required)			
Citizenship Status (select one):	U.S. Citizen	Resident Alien	Non-resident Alien (If check, please provide W8)
If not a U.S. Citizen, Enter Country of Citizenship			

**Employment Information**

Employer Name	
City	State
Job title / Profession	

To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify and record information that identifies each person who opens an account. What this means to you: When you open an account we will need to provide: name, street address, date of birth and other information that will allow us to identify you. We will also ask you to enter your driver's license or other form of identifying documents.

**HSA Eligibility Requirements:**

<b>Yes</b>	<b>No</b>	<b>Accountholder certification-</b> (1) I certify that: I am or effective _____ I will be covered by single family qualified High Deductible Health Plan (HDHP). With a deductible of _____. (2) I certify that I am not covered by a health plan, other than a HDHP which provides any of the same benefits as the HDHP. (3) I am not enrolled in Medicare and (4) I may not be claimed as a dependent on another person's tax return.
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**If you answered NO to the above, you are not eligible to establish a Health Savings Account.**  
You cannot pay for qualified medical expense from your account tax free before your account is "established." Under current IRS guidance, you must look to the law of your state to determine if the account must be funded to "establish" it. In order to assure that your qualified medical expenses can be paid tax-free from your HSA the most prudent course of action would be to pay out of your HSA only those medical expenses which were incurred after the date that funds are first credited to your account. Claiming expenses before funds are credited to your HSA could subject you to pay tax penalties. If you want to claim expenses uncured before that date you should first consult with your tax advisor.

**Signature Important:** Please read before signing.

HSA Bank is hereby appointed to serve as custodian of my Health Saving Account. HSA Bank a division of Webster Bank N.A. are the same FDIC – insured institution. Deposit held under each trade name are not separately insured but are combined to determine whether a depositor has exceeded the federal deposit limit. I received a copy of and agree to the Deposit Account Agreement Disclosures for Health Savings Accounts Truth in Savings and Privacy Statement Within seven calendar days I opened this HSA. I may revoke authorization by mailing a written notice to HSA Bank.

<b>Accountholder Signature:</b>	<b>Date:</b>
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