

# Health Savings Account Contribution Form



## Step 1: Accountholder Information

\*=Required Fields

\*Employer Name (If sponsored by an employer plan)

-  -

\*Member Name (First, MI, Last) \*Social Security Number

-  -

\*Day Telephone \*Birth Date (MM/DD/YYYY)

\*Permanent Address \*City \*State \*Zip Code

## Step 2: Contribution Information

Note: Deposits may not be available for immediate withdrawal

Contribution Amount  Contribution for Tax Year

Note: Prior year deposits must be received by the tax filing deadline of the following year, typically April 15. The IRS does NOT allow an extension of time to contribute to an HSA, even if you have an extension for filing your taxes. If a year is not specified, your contribution will be deposited for the year in which it was received.

- Regular
- Catch-up
- Mistaken Distribution

**Please make check payable to: HSA Bank. You must mail the check with the completed Health Savings Account Contribution Form to: HSA Bank, P.O. Box 939 Sheboygan, WI 53082.**

## Step 3: Consumer Authorization

I certify that I am the HSA member or an individual authorized to execute this transaction. I have read and understand the instructions and any rules or conditions relating to and have met the requirements for making this transaction. I assume full responsibility for this transaction and will not hold HSA Bank liable for any adverse consequences that may result. I have not received tax or legal advice from HSA Bank. If necessary, I will seek the advice of a tax or legal professional to ensure my compliance with related laws. All information provided by me is true and correct and may be relied upon by HSA Bank.

\*Accountholder Signature Date

## Rules and Conditions Applicable to Contributions

<b>General Information</b>	Any contributions received will be deposited in the cash account. The IRS allows HSA accountholders to make contributions for the previous tax year through your normal tax-filing deadline (not including extensions), which is typically April 15th of the current year.
<b>Contribution Type</b>	<p><b>Regular</b> Annual maximum contribution limits can vary from year to year. For current contribution maximums, visit our Frequently Asked Questions section at <a href="http://www.hsabank.com/hsabank/accountholders/frequently-asked-questions">http://www.hsabank.com/hsabank/accountholders/frequently-asked-questions</a>.</p> <p><b>Catch-Up</b> If you are 55 years of age or older during the calendar year, you may make an additional "catch up" contribution of up to \$1,000.</p> <p><b>Mistaken Distribution</b> According to IRS Notice 2004-50, an HSA Custodian or Trustee may allow the return of mistaken distributions. The Custodian or Trustee may rely on the Accountholder's representation that the distribution was, in fact, a mistake.</p>

**Questions?** Please call the Client Assistance Center at **1-855-731-5213**  
(M-F, 7 a.m.-9 p.m., Sat 9 a.m.-1 p.m., CT)