Please return completed form to the Office of Payroll and Employee Benefits. Do NOT fax to HSA Bank. Thank you.



Health Savings Account (HSA) Application and Eligibility Form

Instructions: Complete all fields below. Mail or fax your application to: HSA Bank, P.O. Box 939, Sheboygan, WI 53082, Fax: (920) 803-4184 For assistance, call (800) 357-6246, Monday - Friday, 7 a.m. - 9 p.m., CT. Para ayuda en Español, por favor llamar (866) 357-6232.

PART 1: GENERAL INFORMATION	I FOR F	RIMA	RY AC	COUNTHO	LDER						
First Name:	MI:	Last N	Name:				Date of Birth:	(mm/dd/yyyy)	Soci	al Security Number:	
Street Address: (Required)					City:	City: State:			ZIP	Code:	
Preferred Mailing Address: Street Address P.O. Box						Email:					
P.O. Box:						City:			ZIP	Code:	
Home Phone:						Business Phone:					
Citizenship Status: U.S. Citizen Resident Alien In Non-resident Alien (If checked, please provide W8)						If not a U.S. Citizen, enter Country of Citizenship:					
Employment:											
Employer:						Title/Profession:					
Health Plan Insurance: Single Family Effective Dat				e Date of your	our Health Insurance:				Deductible Amount: \$		
PART 2: AUTHORIZED SIGNER OPTIONAL: (SUCH AS A SPOUSE OR ANOTHER THIRD PARTY)											
By completing all of the fields below, you are authorizing the person designated as "Authorized Signer" to access and initiate transactions on your account as your agent. HSA Bank will rely upon this designation until HSA Bank receives your written revocation of this authorization and has had a reasonable time to act upon it. You hold harmless and indemnify HSA Bank against any claims against or losses arising out of HSA Bank's reliance on this authorization, and release HSA Bank from any liability arising from such reliance, unless otherwise prohibited by law. You remain solely responsible for any tax consequences that result from any actions taken by the authorized signer regarding your account.											
First Name:	MI:	Last N	Name:			Date of Birth: (m		(mm/dd/yyyy)	Soci	al Security Number:	
Address same as accountholder Street Address:											
City: State:					ZIP Code: Phone Number			er:			
If you would like to designate a beneficiary for your account, please complete our Designation of Beneficiaries form which is available on our website at: http://www.hsabank.com/beneficiary . UPON NOTICE TO HSA BANK OF YOUR DEATH, THIS AUTHORIZATION TERMINATES, AND RIGHTS TO FUNDS IN YOUR ACCOUNT WILL BE TRANSFERRED TO YOUR BENEFICIARIES. IF YOU DID NOT NAME A BENEFICIARY, YOUR ACCOUNT BALANCE WILL BE PAYABLE THROUGH YOUR ESTATE.											
PART 3: ACCOUNT SELECTIONS											
Please select the account options and enter an amount where appropriate.											
Primary Accountholder debit card (No Charge)											
Authorized Signer debit card (if applicable) (No Charge)											
Checks (\$7.95 – check must be include	ed to proc	ess ord	· · ·								
☐ Initial Contribution	attach the	IICA tra	\$ nofor/roll	aver form or ID		ntribution Yea	r 				
Transfer: Yes No (If yes, please attach the HSA transfer/rollover form or IRA form.)											
PART 4: ACCOUNT AUTHORIZATION											
 By signing below, I certify that: I am, or will be covered by a qualified High Deductible Health Plan (HDHP), I am not enrolled in Medicare or covered under other health insurance that is not compatible with an HSA, and I may not be claimed as a dependent on another person's tax return (excluding spouses per the IRS). HSA Bank is hereby appointed to serve as custodian of my Health Savings Account. I have received a copy of and agree to the Deposit Account Agreement and Disclosures for Health Savings Accounts, Truth in Savings, and Privacy Statement. HSA Bank, a division of Webster Bank, N.A. and Webster Bank, N.A. are the same FDIC-insured institution. Within seven (7) calendar days from the date I open this HSA, I may revoke authorization for opening the account by mailing a written notice to HSA Bank. To help the government fight the funding of terrorism and money laundering activities, Federal Law requires that all financial institutions 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 you and your authorized signer to provide name, street address, date of birth and other information that will allow us to identify you and your authorized signer. We may also ask to see your driver's license or other identifying documents. 											
Accountholder Signature:							Date:				
For Tracking Purposes (to be completed by	employe	or insu	urance/fi	nancial repres	entative)		· ·			Internal Use Only:	
Health Plan Code Broker Dealer AIN	I# 	TPA	SVC	Software	MGA	. M	arketing	Employer Fed I	D#		