

Health Savings Account (HSA) Employee Enrollment Form

Employee Information		
Last name	First name	M.I.
Date of birth	Social security #	Employer
Mailing address	City	State/Zip
Street address (required)	Home phone # (area code)	Work phone # (area code & ext.)
Coverage for <input type="checkbox"/> Employee only <input type="checkbox"/> Employee and 1 or more dependants	Maximum contribution (total of employee & employer contributions): \$3,600.00 Employee only \$7,200.00 Employee and 1 or more dependants Catch-up contribution <input type="checkbox"/> An additional \$1,000 catch-up contribution is allowed for participants who are 55 and older	
Do you currently have an HSA account with Health Equity: <input type="checkbox"/> Yes <input type="checkbox"/> No	Have you had an account in previous years: <input type="checkbox"/> Yes <input type="checkbox"/> No	

Account Setup	
Employee contribution deducted per pay period: \$ _____ (fixed amount pulled per pay period):	Total annual employee contribution: \$ _____ 1/1/21 - 12/31/21
Employer contribution per month: \$ _____ (fixed amount contributed per month):	Total annual employer contribution: \$ _____ 1/1/21 - 12/31/21
Number of pays contributions are pulled from yearly: <input type="checkbox"/> 24 <input type="checkbox"/> 26 # _____ (remaining pay periods for participants enrolling mid-year) (This information will be used by your employer to setup a scheduled pre-tax payroll deduction. If enrolling mid-year, calculate total annual contribution by multiplying the salary reduction per pay period by the remaining pay periods left in the fiscal year.)	Total annual contribution: \$ _____ The Pool will cover the administration fee for you if you remain on a high deductible health plan.

Primary Beneficiary Information		
Name	Relationship	Social security #
Address	City	State/Zip

Authorization and Certification

- I understand that I must be covered by a qualified high deductible health plan, not covered by another health plan including Medicare, and cannot be claimed as a dependent on another individual's tax return.
- In compliance with the USA PATRIOT Act, HealthEquity must verify the identity of all customers seeking to open an HSA. As part of this identity verification process, you may be asked to provide additional information and/or documentation before your account can be established.

Print name

Signature

Date

If you have any questions about your HSA, please call HealthEquity at (866) 346-5800.