



CONTRIBUTION AND INVESTMENT SELECTION



PART 1. HSA OWNER

Name (First/MI/Last)
Social Security Number
Date of Birth
Phone
Email Address
Account Number
Suffix

PART 2. HSA TRUSTEE OR CUSTODIAN

To be completed by the HSA trustee or custodian

Name: The HSA Authority
Address Line 1: Attn HSA Operations Center
Address Line 2: PO Box 3606
City/State/ZIP: Evansville, IN 47735
Phone: 1-888-472-8697
Organization Number
Fax: 812-468-1173

PART 3. CONTRIBUTION INFORMATION

Contribution Amount
Contribution Date

CONTRIBUTION TYPE (Select one)

- 1. Regular (Includes catch-up contributions as well as qualified HSA funding distributions from an IRA)
2. Rollover (Distribution from an HSA or Archer MSA that is being deposited into this HSA)
3. Transfer (Direct movement of assets from an HSA or Archer MSA into this HSA)

PART 4. INVESTMENT AND DEPOSIT INFORMATION

INVESTMENT INFORMATION (Complete this section as applicable.)

Table with 6 columns: Investment Description, Quantity or Amount, Status (new or existing), Investment Number, Term or Maturity Date, Interest Rate

DEPOSIT METHOD

- Cash or Check (If the contribution type is transfer, the check must be from a financial organization made payable to the trustee for this HSA.)
Internal Account
External Account (e.g., EFT, ACH, wire) (Additional documentation may be required and fees may apply.)

Deposit Taken by

PART 5. SIGNATURE

I certify that all of the information provided by me is accurate and may be relied upon by the trustee or custodian. I certify that the contribution described above is eligible to be contributed to the HSA and I authorize the deposit/investment in the manner described above.

X
Signature of HSA Owner

Date (mm/dd/yyyy)

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## **RULES AND CONDITIONS APPLICABLE TO HSA CONTRIBUTIONS**

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HSA contribution rules are often complex. The general rules are listed below. If you have any questions regarding a contribution, please consult with a competent tax professional or refer to IRS Publication 969, *Health Savings Accounts and Other Tax-Favored Health Plans*, for more information. This publication is available on the IRS website at [www.irs.gov](http://www.irs.gov) or by calling 1-800-TAX-FORM.

### **REGULAR**

The total amount you may contribute to an HSA for any tax year cannot exceed the published annual limit. A qualified HSA funding distribution is a one-time direct movement of assets from a Traditional IRA or Roth IRA, and is treated as a regular HSA contribution.

- You may make a contribution for the prior year up until your tax filing deadline for that year, not including extensions. Designating a contribution for the prior year is irrevocable.
- If you are age 55 or older by the end of the year, you may be eligible to make an additional catch-up contribution to an HSA for that tax year.

### **ROLLOVER**

A rollover is a distribution and a subsequent tax-free movement of assets from any of your other HSAs or Archer medical savings accounts (MSAs) to your HSA.

- You are permitted to make only one rollover contribution to any of your HSAs in a 12-month period.
- A rollover generally must be completed within 60 days from the date you receive the assets.

### **TRANSFER**

A transfer is a direct movement of assets to your HSA from any of your other HSAs or Archer MSAs. You may perform an unlimited number of transfers.