

Health savings account (HSA) employee enrollment form



Return completed forms to your Human Resources Department.

Employer information
Enrollment cannot be processed without your employer's name.
Employer name

Account holder information			
First name	M.I.	Last name	
SSN	Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	Date of birth (mm/dd/yyyy)	
Email address		Home phone ()	
Physical street address	City	State	ZIP
Mailing address (if different)	City	State	ZIP

Insurance coverage	
Insurance carrier	
Coverage effective date	Coverage type <input type="checkbox"/> Single <input type="checkbox"/> Family

Authorization and certification		
<p>By opening a health savings account (HSA) with HealthEquity, you accept the terms of HSA enrollment and the custodial agreement. You may view the HSA custodial agreement here: http://resources.healthequity.com/Forms/Agreements/HealthEquity_Custodial_Agreement.pdf. Upon enrollment, you understand and agree to the following:</p> <ul style="list-style-type: none"> You are covered by a qualified high deductible health plan (HDHP). You are not covered by any other non-qualified health coverage, including Medicare. You are not claimed as a dependent on another individual's tax return. HealthEquity must verify your identity in order to open your HSA. <p>For further information regarding HSA laws, go to http://www.irs.gov/pub/irs-pdf/p969.pdf.</p>		
Print name	Signature	Date

Contribution information and authorization	Frequency of payroll <input type="checkbox"/> Weekly <input type="checkbox"/> Bi-Weekly <input type="checkbox"/> Monthly
Please withhold \$_____ from my payroll and apply the funds to my HealthEquity HSA.	
Signature	Date

2020 annual HSA contributions		
Coverage type	Total annual contribution*	Per month
Self-Only	\$3,550	\$295.83
Family	\$7,100	\$591.67

2021 annual HSA contributions		
Coverage type	Total annual contribution*	Per month
Self-Only	\$3,600	\$300.00
Family	\$7,200	\$600.00

*Employer and employee contributions count towards the maximum yearly contribution amount.

Your HSA cash balance is held at an FDIC-insured or NCUA-insured institution and is eligible for federal deposit insurance, subject to applicable requirements and limitations.