

HSA Contribution Form

Instructions:

1. Use this form to make a normal, mistaken distribution, or rollover contribution to your HSA. Use the [HSA Transfer Form](#) to request a transfer from another custodian/trustee into your HSA administered by **Benefit Strategies, LLC**.
2. Enclose a check made payable to **Benefit Strategies, LLC** (HSA Administrator) and forward with completed form to PO Box 1300, Manchester, NH 03105
3. Avoid the tax and penalty involved with excess contributions! Visit benstrat.com and view contribution maximum information in the HSA section of our website, including the GPS Fact Sheet HSAs and Partial-Year Eligibility.

Did you know that you can:

- Request distribution online or through our mobile app
- Click [here](#) to access your online portal
- Click [here](#) for information on our mobile app
- Sign-up for direct deposit online

Accountholder Information:

Name:

First/Last

Social Security Number:

Employee ID and Employer:

(if applicable)

Primary Phone:

E-mail Address:

Street Address:

City:

State:

Zip Code:

Contribution Information:

If you have automatic investment sweeps on your account, contributions over the cash minimum (threshold) qualify to be invested and will be placed by default into an interest-bearing account. If you would like to change your investment allocation, you may do so by logging in to your account at www.benstrat.com. Future contributions will be allocated according to your investment allocation instructions.

Contribution Amount \$ _____

Contribution for Tax Year _____

Contribution Type (choose one below)

- Normal - A normal contribution would include a regular, catch-up, or post-tax contribution.
- Mistaken Distribution – Contributions for a mistaken distribution must occur before December 31 of the year in which the mistaken distribution occurred. Contributions received after December 31 will be applied to the contribution maximum for the following year.
- Rollovers from (choose one): HSA MSA Please include a check.

Rules and Conditions Regarding Rollovers: A rollover is a way to move money or property from one HSA or Medical Savings Account (MSA) to another HSA. The Internal Revenue Code limits the number of rollovers that may be taken, how quickly rollovers must be completed and how the trustee or custodian must report the transaction.

Timeliness: The funds you receive from the distributing HSA or MSA must be deposited into another HSA within 60 days of receipt of funds.

Twelve Month Restriction: You can only make one rollover contribution per HSA per twelve-month period.

I have enclosed a check from the previous trustee or custodian for my rollover.



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Signature:

I certify that I am the HSA accountholder 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 Administrator or WEX Health, Inc liable for any adverse consequences that may result. I have not received tax or legal advice from HSA Administrator or WEX Health, Inc and, if necessary, 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 Administrator and WEX Health, Inc. If I have chosen rollover as the contribution type, I make an irrevocable election to treat this transaction as such.

Signature of HSA Accountholder:

First/Last

Date:

MM/DD/YYYY
