

## HSA Contribution Form

Purpose: Use this form to make contributions to your HSA. This may be a one-time contribution or to set up automatic monthly contributions. You can also use this form to change your monthly contribution amounts.

### 1. Personal Information

Name: \_\_\_\_\_  
Social Security #: \_\_\_\_\_  
HSA Account Number (if available): \_\_\_\_\_

### 2. Contribution Type (check only one – unless you are making multiple types of contributions)

- a)  **Regular Contribution.**  for current tax year or  prior tax year  
b)  **Rollover Contribution.** Rollover from another HSA (this form is not needed if you are also completing an Application along with this rollover)  
c)  **Transfer Contribution.** Transfer from another HSA – Please use the Transfer Form for this purpose  
d)  **Return of Mistaken Distribution.** If you mistakenly take a distribution for an expense that you thought was “eligible,” but which you later learn is not, you can repay the amount into your HSA so long as the mistake of fact was due to a “reasonable cause,” and the mistake is corrected no later than April 15 following the year you knew or should have known of the mistake. Check this box to make sure we report your contribution appropriately.

### 3. Contribution Amount

- a) **Amount (if paid by check).** \_\_\_\_\_  
b) **Amount (if paid electronically via ACH)** (complete this section for automated monthly contributions or to make a one-time contribution using the ACH system from your personal checking account)  
(1)  **Automated Monthly Contributions.** If you want to set up automatic monthly withdrawals from another checking account, complete the following. You must attach a voided check from the account you wish to withdraw.  
(a) Monthly Amount \$\_\_\_\_\_ Date  15<sup>th</sup>  30<sup>th</sup>  
(2)  **One Time ACH Contribution.** If you want to make a one time contribution to your HSA using the ACH system (transfer from another financial institution).  
(a) **Account to Be Debited** (or attach check).  
Name on Account: \_\_\_\_\_  
Account: \_\_\_\_\_  
Bank Name: \_\_\_\_\_ Routing #: \_\_\_\_\_  
(b) **Amount.** \_\_\_\_\_

### 3. Signatures. I hereby agree to make the HSA contribution described above.

\_\_\_\_\_  
HSA Owner Signature

\_\_\_\_\_  
Date

Please send form to address above (in the logo).