



HSA CHECKLIST

Please fill in all the HSA account information.

- Complete HSA application & return with **\$35.00 set up fee** and check for deposit of at least **\$50.00**.
- Copy of Drivers License for each person signing on the account required by Mid America Bank.
If your address has changed and the change is not reflected on the ID, please send a copy of a utility bill as a verification of address.

Send in completed HSA application to:

Mid America Bank
PO Box 4
Baldwin City, KS. 66006



HSA NEW ACCOUNT

- Application Information -

HSA ACCOUNT HOLDER

Name (First): _____ (Middle): _____ (Last): _____

Street Address _____ City: _____ State: _____ Zip: _____

Mailing Address _____ City: _____ State: _____ Zip: _____

Birth Date _____ SSN _____ Email _____

Primary Phone _____ Secondary Phone _____ Employer _____

Drivers License # _____ State: _____ Issue Date _____ Expiration Date _____

I state that I have a Qualified High Deductible Health Plan (QHDHP) with: _____

My policy deductible is: \$ _____ My out of pocket is \$ _____

Effective Date _____ I have a single family policy

2018 Yearly maximum contribution for **individuals** is 100% of the annual deductible, not to exceed \$3,450.

2019 Yearly maximum contribution for **individuals** is 100% of the annual deductible, not to exceed \$3,500.

2018 Yearly maximum contribution for a **family** is \$6,900.

2019 Yearly maximum contribution for a **family** is \$7,000.

** Catch-up contribution of \$1,000 can be made any time during the year in which the HSA participant turns 55. If you exceed the yearly maximum, contribution allowed you might be subject to IRS penalties.*

Contribution will be made by Employer using ACH Direct Deposit. Employer & Employee contributions will be deposited semi-monthly using ACH Direct Deposit.

The Employer contribution is \$ _____ semi-monthly for single and \$ _____ semi-monthly for family.

Employer contribution \$ _____

Please contact us to apply for a debit card on this account.

The maximum daily withdrawal limit on the debit card is \$500.

ADDITIONAL HSA ACCOUNT AUTHORIZED SIGNER

Since regulations require that only one individual own a HSA, the account owner may want his/her spouse and/or another authorized signer on this account.

Name (First): _____ (Middle): _____ (Last): _____

Street Address _____ City: _____ State: Kansas Zip: _____

SSN _____ Birth Date _____ Primary Phone _____

Email _____ Employer _____

BENEFICIARY(IES) - required

| Name | Address | SSN | Relationship | DOB | Percentage |
|-------|---------|-------|--------------|-------|------------|
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |

Under penalty of perjury, I certify that the Social Security Number shown above on this form is my correct taxpayer identification number. I understand the eligibility requirements for the type of HSA deposit I am making and reaffirm that I do qualify to make the deposit. I have received a copy of the Mid America Bank Enrollment and Custodial Agreement forms and understand the terms and conditions of the HSA account. **I understand that Mid-America Bank charges a \$35 initial setup fee and a \$3.00 monthly statement fee (statement fee is waived with E-Statements).**

I assume complete responsibility for:

- 1. Determining that I am eligible for an HSA each year I make a contribution.**
- 2. Ensuring all contributions I make are within the limits set forth by the tax laws.**
- 3. The tax consequences of any contribution (including rollover contributions) and distributions.**

Signature of HSA account holder _____ **Date** _____

Signature of authorized signer _____ **Date** _____