

# Health Savings Account (HSA) Employee Enrollment Form

Mail or fax completed forms to:

**Address:** HealthEquity, Attn: HSA Enrollment  
15 West Scenic Point Drive, Ste 400, Draper, UT 84020

**Fax:** 520.844.7090



<p><b>Eligibility</b></p> <p>To be eligible to open a health savings account (HSA), you must meet three criteria: 1) You must be covered by a qualified high-deductible health plan (HDHP), 2) You can't be covered by another health plan, including Medicare, 3) You can't be claimed as a dependent on another individual's tax return.</p>
--

<p><b>Employer Information</b></p> <p>Enrollment cannot be processed without your employer's name.</p> <p>Employer Name</p>
---

<b>Account Holder Information</b>			
First Name	M.I.	Last Name	
SSN	Gender <input type="checkbox"/> Male <input type="checkbox"/> Female	Date of Birth (mm/dd/yyyy)	
E-mail Address		Home Phone (     )	
Physical Street Address	City	State	ZIP
Mailing Address (if different)	City	State	ZIP

<b>Insurance Coverage</b>	
Insurance Carrier	
Coverage Effective Date	Coverage Type <input type="checkbox"/> Single <input type="checkbox"/> Family
Employee Contribution Amount \$	Employer Contribution Amount \$

<b>Authorization and Certification</b>		
<ul style="list-style-type: none"> <li>I accept the terms of the HealthEquity HSA enrollment form and the HSA custodial agreement. The HSA custodial agreement is available by selecting Forms and Docs on the HealthEquity member portal.</li> <li>In compliance with the USA PATRIOT Act, HealthEquity must verify the identity of all customers seeking to open an HSA. As part of this identity verification process, you may be asked to provide additional information and/or documentation before your account can be established.</li> </ul>		
Print Name	Signature	Date

The balances in all HealthEquity HSAs are FDIC-insured unless invested in mutual funds.

