

# Introduction to HSAs Webinar



**August 25, 2022**

**VIRTUAL VIA ZOOM**

**Questions:** Call the SDBA at 800.726.7322 or email Natalie Likness at [nlikness@sdba.com](mailto:nlikness@sdba.com)

## ■ **WEBINAR OVERVIEW**

Health Savings Accounts (HSAs) are a popular health care option for employers offering coverage to employees and individuals/families not covered by employer-sponsored health care benefits. Financial institutions are beginning to see more complex transactions due to increased customer activity. This activity requires personnel to review their existing HSA procedures to ensure transactions are handled properly. This program also provides a solid foundation of operational and compliance issues associated with providing HSAs to customers, including opening, maintaining and distributing procedures.

## ■ **COURSE HIGHLIGHTS**

1. Eligibility requirements
2. Required documents to establish an HSA
3. Contribution limits
4. Portability rules
5. Handling excess contribution and Mistaken Distributions
6. Distribution options for qualified medical expenses
7. IRS reporting requirements

## ■ **WHO SHOULD ATTEND?**

New bankers, personal bankers and tellers would benefit from attending this webinar.

## ■ **WEBINAR PRESENTER**

Matthew Dickinson not only instructs, but he listens and responds to special needs and involves his audience in an effective group learning experience. Attendees are encouraged to ask questions or share concerns throughout the program.

## ■ **SCHEDULE & DURATION**

10:00 a.m. CDT, 45 minutes

## ■ **REGISTRATION FEE**

*(Includes program and instruction materials.)*

Member	\$100
Non-Member	\$200

*Zoom link will be sent via email on Friday, August 19<sup>th</sup>.*



# Introduction to HSAs Webinar via Zoom

August 25, 2022 | 10:00 a.m. CDT

**Register online** at <https://sdba.memberclicks.net/introHSA22> or **Return** form and payment to SDBA, PO Box 1081, Pierre, SD 57501, fax to 605.224.7835, or email to [events@sdba.com](mailto:events@sdba.com).

Institution \_\_\_\_\_ Phone Number \_\_\_\_\_

Mailing Address \_\_\_\_\_

Employee	City	Email

**Registration:** \$100/person for members or \$200/person for non-members.

**Payment Method:** **Total fees due:** \$ \_\_\_\_\_  Check enclosed.  Please send me an invoice.

Please bill credit card.  Visa  MasterCard  Discover  American Express

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**Cancellation Policy:** 100% refund if canceled on or before 8/18/2022; 75% refund if canceled before 8/22/2022; no refund if canceled on or after 8/22/2022. Substitutions allowed at any time.