

# HEALTH SAVINGS WEBINAR

Date: May 14, 2019 HSAs: Beyond the Basics  
Time: 9:30 a.m. to 10:40 a.m. CDT (70 minutes)  
Presenter: JM Consultants, Michael O'Brien  
Cost: \$185, additional bank branch connections only \$60 per connection  
Questions: Call Mike Nelson by phone at 218-831-1858 or by email at m88nelson@hotmail.com

## **Health Savings Accounts (HSAs) – Beyond the Basics**

As the nationwide growth of Health Savings Accounts (HSAs) continue to rise, financial organizations 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. We'll explore the areas of employee eligibility, handling excess and mistaken distributions, investment diversification and product expansion, including how HSAs are being touted as a retirement savings vehicle in addition to a health care coverage option. Attendees will learn:

- Partial eligibility rules and testing period
- Qualified HSA funding distributions
- Popular investment alternative selections
- Excess contribution correction methodology
- How to process mistaken distributions
- HSA Beneficiary options
- Distribution options after age 65
- IRS reporting requirements
- Current events – HSA proposals

**NOTE: We can do a special customized HSA Webinar just for your bank or if you have a lot of branches, it may be less expensive to have your own webinar. You choose the time and content. Call Mike!**

### ***REGISTRATION FORM/Please Print***

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Address: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Email: \_\_\_\_\_

First Connection listed above and Additional Site Connections listed below!

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Email Registration to: [m88nelson@hotmail.com](mailto:m88nelson@hotmail.com) \_\_\_\_\_ TO BE INVOICED

OR

Send Registration and Check to: JM Consultants, 6930 Glory Road, Baxter, MN 56425