

2026 SDBA INTRO TO HSAs

Tuesday, July 14, 2026

Online via Zoom | 9:00 a.m. CDT

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.



DATE & TIME

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REGISTRATION FEE

Member - \$120

Non-Member - \$220

QUESTIONS & ANSWERS

Call the SDBA at 605.224.1653 or email events@sdba.com.



REGISTRATION:

Register online at www.sdba.com or, **return form** and payment to SDBA, PO Box 1081, Pierre, SD 57501, fax to 605.224.7835, or email to events@sdba.com.

INSTITUTION: _____

MAILING ADDRESS: _____

PHONE NUMBER: _____

Employee	City	Email

Registration: \$120/person for members or \$220/person for non-members. *100% refund if canceled on or before 7/3/2026; 75% refund if canceled between 7/4/2026 and 7/11/2026; no refund if canceled after 7/11/2026. Substitutions allowed at any time.*

Payment Method:

Total fees due: \$ _____

- Check enclosed.
- Please send me an invoice.
- I would like to use a credit card. Please contact me.

