

Introduction to HSAs Webinar



August 29, 2023

VIRTUAL VIA ZOOM

Questions: Call the SDBA at 800.726.7322 or email events@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 25th.



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Register online at <https://sdba.memberclicks.net/introHSA23> 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 _____ Phone Number _____

Mailing Address _____

Employee	City	Email

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

Cancellation Policy: 100% refund if canceled on or before 8/19/2023; 75% refund if canceled before 8/20/2023 – 8/23/2023; no refund if canceled on or after 8/24/2023. Substitutions allowed at any time.



Payment Method: Total fees due: \$ _____



Check enclosed. Please send me an invoice Please bill credit card. (SDBA will call)