Health savings account (HSA) employee enrollment form

HealthEquity®

Return completed forms to your Human Resources Department.

Employer information

Enrollment cannot be processed without your employer's name.

Employer name

Account holder information

First name	M.I.	Last name	
SSN	Gender ☐ Male ☐ Female	Date of birth (mm/dd/yyyy)	
Email address		Home phone ( )	
Physical street address	City	State	ZIP
Mailing address (if different)	City	State	ZIP

Insurance coverage

Insurance carrier

Coverage effective date	Coverage type ☐ Single ☐ Family

Authorization and certification

By opening a health savings account (HSA) with HealthEquity, you accept the terms of HSA enrollment and the custodial agreement. You may view the HSA custodial agreement here: http://resources.healthequity.com/Forms/Agreements/HealthEquity_Custodial_Agreement.pdf. Upon enrollment, you understand and agree to the following:

- You are covered by a qualified high deductible health plan (HDHP).
- You are not covered by any other non-qualified health coverage, including Medicare.
- You are not claimed as a dependent on another individual's tax return.
- HealthEquity must verify your identity in order to open your HSA.

For further information regarding HSA laws, go to http://www.irs.gov/pub/irs-pdf/p969.pdf.

Print name	Signature	Date

Contribution information and authorization

Frequency of payroll ☐ Weekly ☐ Bi-Weekly ☐ Monthly ☐ Semi-monthly

Please withhold $___________ from my payroll and apply the funds to my HealthEquity HSA.

Signature	Date

2025 annual HSA contributions

Coverage type	Total annual contribution*	Per month
Self-Only	$4,300	$358.33
Family	$8,550	$712.50

2026 annual HSA contributions

Coverage type	Total annual contribution*	Per month
Self-Only	$4,400	$366.66
Family	$8,750	$729.16

*Employer and employee contributions count towards the maximum yearly contribution amount.

Your HSA cash balance is held at an FDIC-insured or NCUA-insured institution and is eligible for federal deposit insurance, subject to applicable requirements and limitations.