

## High Deductible Health Plan and Health Savings Account Application

PLEASE FOLLOW THE DIRECTIONS TO SET UP YOUR HEALTH SAVINGS ACCOUNT (HSA).

1. Complete the Personal information section completely
2. If you would like another person to have authorization to sign on this account and use the debit card please complete this section with their signature and a copy of their unexpired drivers license
3. Eligibility Requirement: Indicate the date your health insurance becomes effective and if you have enrolled in the \$1250 or \$2500 deductible plan
4. Designation of Beneficiary: complete primary and contingent beneficiary information completely
5. HSA deposit information:
6. Signatures: **SIGN AND DATE**

AUTHORIZED SIGNOR: the person you indicated in #2

**ACCOUNT HOLDER: YOU**

**YOU MUST PROVIDE A COPY OF THE FRONT AND BACK OF YOUR UNEXPIRED DRIVERS LICENSE and the authorized signor if one is listed**

In order to receive tax favored treatment for distributions from your HSA, any qualified medical expense must be incurred AFTER the date you establish your HSA. In other words, if you do not have this form to Pinnacle before your health insurance becomes effective and you have allowable expenses before you do send the form to Pinnacle, you will not be able to reimburse yourself or any providers for those qualified expenses.

**Note: There will a \$13.00 check charge for checks ordered on the account.**

### **Application Process:**

Send a scan of the signed application and your driver's license to Susan Newkirk ([snewkirk@cbjw.net](mailto:snewkirk@cbjw.net)), Benefits Administrator at The Crichton Group.

If you need to fax the forms, first enlarge and lighten the driver's license copy, then fax to 687-2841.

- A bank debit card will be mailed to you 2-3 weeks after all information has been received.
- The account number will be forwarded to Human Resources at Cumberland Heights and the employer direct deposit for the HSA will be setup based on your Medical Option 2 election (employee or family).
- Your own HSA deposit (if you entered an amount during your enrollment) will be entered for deposit beginning January 11, 2013.