

HSA Contribution Form

Purpose: Use this form to make contributions to your HSA. This may be a one-time contribution or to set up automatic monthly contributions. You can also use this form to change your monthly contribution amounts.

1. Personal Information

Name: _____
 Social Security #: _____
 HSA Account Number (if available): _____

2. Contribution Type (check only one – unless you are making multiple types of contributions)

- a) **Regular Contribution.** for current tax year or prior tax year
- b) **Rollover Contribution.** Rollover from another HSA (this form is not needed if you are also completing an Application along with this rollover)
- c) **Transfer Contribution.** Transfer from another HSA – Please use the Transfer Form for this purpose
- d) **Return of Mistaken Distribution.** If you mistakenly take a distribution for an expense that you thought was “eligible,” but which you later learn is not, you can repay the amount into your HSA so long as the mistake of fact was due to a “reasonable cause,” and the mistake is corrected no later than April 15 following the year you knew or should have known of the mistake. Check this box if you meet these requirements and we will report your contribution appropriately.

3. Contribution Amount

- a) **Amount (if by check payable to Falcon National Bank for HSA of Your Name).** _____
- b) **Amount (if paid electronically via ACH).** Complete this section for automated monthly contributions or to make a one-time contribution using the ACH system from your personal checking account. You must attach a voided check from the account that you wish to withdraw the funds.

- (1) **Automated Monthly Contributions.** (Attach voided check). If you want to set up automatic monthly withdrawals from another checking account, complete the following:
(a) Account to Be Debited. (Attach voided check).

Name on Account: _____
 Account: _____ Checking or Savings
 Bank Name: _____ Routing #: _____

(b) Monthly Amount \$ _____ **Date** 15th 30th

- (2) **One Time ACH Contribution.** If you want to make a one time contribution to your HSA using the ACH system (transfer from another financial institution).

(a) Account to Be Debited. (Attach voided check).
 Name on Account: _____
 Account: _____
 Bank Name: _____ Routing #: _____

(b) Amount. _____

3. Signatures. I hereby agree to make the HSA contribution described above.

 HSA Owner Signature

 Date

Please send form to address in the upper right corner above or fax to 866.826.0104.