

Health Savings Account (HSA) Contribution Coupon (Deposit Slip)

***Save time by making HSA contributions online rather than mailing your deposit. Go online and click on “Link My Bank Accounts” or contact our Customer Service Department for assistance. ***

Instructions:

- Step 1.** Enter the Account Owner’s name and last four (4) digits of their Social Security Number.
 - Step 2.** Enter the amount.
 - Step 3.** Check the type of deposit. *If a deposit type is not selected, we will deposit the funds as a current year deposit*
 - **Current Year Deposit** – A new contribution for the current tax year.
 - **Prior Year Deposit** – A new contribution for the prior tax year. You can make a contribution for the prior tax year between January 1 and the tax filing deadline (normally April 15 of this year). **Note:** If you have already filed your tax return for last year, you may have to file an amendment. You may want to talk to your tax advisor about this.
 - **Deposit Correction** – A deposit to pay back funds you may have withdrawn by mistake. This is also known as a “refund”. Please include the date of withdrawal.
 - **Rollover from another HSA** – A deposit using funds from another HSA. It does not count toward your IRS contribution limit for the tax year. But you can only make one rollover contribution to an HSA per year. You have 60 days from the date you received the HSA funds from your prior custodian to deposit them into your PayFlex HSA.
 - Step 4:** Enter your PayFlex account number. You can get this from your HSA monthly statement, which is available online.
 - Step 5:** Sign and date the form.
 - Step 6:** Mail your check and coupon to us. The address is on the bottom of the coupon. Keep a copy for your records. Make the check payable to PayFlex Systems USA, Inc.
- Note:** This deposit may have tax consequences. Consult with a tax advisor if you have any questions prior to completing this form. We will return an incomplete form.

**HSA Contribution Coupon
USE ONLY BLUE OR BLACK INK
(Please Print)**

Account Owner Name					Social Security Number (Last 4 Digits)														
Check Amount Enclosed		Deposit Type (Select One)																	
<table border="1" style="width: 100%; height: 20px;"> <tr> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> <td style="width: 20px;"> </td> </tr> </table>												<input type="checkbox"/> Current Year <input type="checkbox"/> Prior Year <input type="checkbox"/> Rollover from another HSA <input type="checkbox"/> Deposit Correction Date of Withdrawal _____ (for deposit corrections only)							
Account Number																			
<table border="1" style="width: 100%; height: 20px;"> <tr> <td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td><td style="width: 20px;"> </td> </tr> </table>																			

Mail this coupon and your check to:
 PayFlex Systems USA, Inc.
 PO Box 3317
 Carol Stream, IL 60132-3317

****Make the check payable to PayFlex Systems USA, Inc.****

Certification

I certify that I am eligible for an HSA. I also certify that I am qualified to make this HSA deposit. I accept the full responsibility for any tax consequences resulting from this transaction. I indemnify and hold PayFlex, its agents and affiliates, harmless from any resulting liabilities. I have received, read, and agree to the Health Savings Account Custodial Agreement. The information I have provided is true and accurate.	
Account Owner Signature	Date