

Health Savings Account (HSA) Contribution Form

Form Instructions: Please complete this form to make a contribution to your health savings account (HSA).

Instead of using this form, online contributions to your HSA are a convenient way to save time and expedite the receipt of funds to your HSA. Instructions for making online contributions can be viewed in your online account.

| STEP 1: Account Holder Information | | | | |
|---|--------------|--|------------|-----------|
| First Name: | Middle Name: | | Last Name: | |
| Permanent Address: | City: | | State: | Zip Code: |
| Date of Birth: Daytime Phone: (Month/Day/Year) / | | | | |
| HSA Account Number: (12 digits from your Welcome Kit or statement. Not your card number.) | | Social Security Number: (Only Last 4 Digits Required) | XXX/XX | <u> </u> |
| STEP 2: Contribution Information | | | | |
| Contribution Amount: \$ | | | | |
| Contribution For: | | | | |
| □ Current Tax Year (<i>yyyy</i>) | | | | |
| □ Prior Tax Year (<i>yyyy</i>) | | | | |
| Source of Contribution: | | | | |

□ Accountholder and/or family member

□ Employer

Employee pre-tax (through Section 125 Plan)

Note: Prior year contributions must be received by the tax filing deadline. Contributions exceeding annual contribution limits will not be accepted. Deposits may not be available for immediate withdrawal.

STEP 3: Authorization

By signing this form, I authorize the deposit of this contribution into my ConnectYourCare health savings account (HSA). I understand that there may be tax consequences associated with this contribution to my HSA. I assume responsibility for any tax consequences or penalties that may apply and for ensuring that all contributions I make are within the HSA contribution limits as set forth by the Internal Revenue Service. I agree that ConnectYourCare shall in no way be held responsible for any tax consequence of this contribution.

Date:

Account Holder Signature:

How to Submit: Please mail the completed form and check or money order, made out to Optum Financial, to:

• Optum Financial, PO BOX 851287, 6300 Wayne Road, Westland, MI 48185

Note: Please include your HSA account number in the check memo field.