

Health Savings Account Excess Contribution Removal Form



Instructions: Complete all the fields below and return the signed form to one of the following:

- **Online:** Log in to your HSA Bank account. Then go to Resources and upload the required document(s) under Secure Document Upload. Create your login at account.hsabank.com if you don't have one.
- **Email:** hsaforms@hsabank.com
- **Mail:** 909 N 8th Street, Suite 200, Sheboygan, WI 53081-4056

For assistance, please call the number on the back of your debit card, or 800-357-6246 if you don't have it.

Contact a tax professional or review IRS Publication 969 for tax-related questions.

Accountholder Information

First name:	Middle initial:	Last name:			
Mailing address:		City:	State:	Zip:	
Phone number:					
Account number (8 or 12 digits from your summary or online account):					
OR					
Full 9-digit social security number:			-		-
<i>Account number OR full social security number is required.</i>					

Excess Contribution Information

(Complete this section with the amount of excess being removed and the earnings on that excess.)

If you are reporting earnings on a distribution of an excess contribution for HSAs and Archer MSAs, use the calculation method found under the IRS regulations section 1.408-11 to calculate net income attributable to IRA contributions that are distributed as a returned contribution.

My excess amount: \$	Earnings on excess: \$
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Method of Funds Returned

- Return my excess contribution funds to me. (Default)
Default method to return funds will be by check unless an external bank account is linked to your HSA.
- Apply my excess contribution as my current year's contribution.
This option may cause a 6% excise tax. Please consult a tax professional regarding this option.

NOTE: HSA contribution maximums are determined by the IRS. Visit hsabank.com/irs-guidelines for current IRS contribution maximums.

Catch-up Contribution

Accountholders who meet the qualifications noted below are eligible to make an HSA catch-up contribution of \$1,000.

- HSA accountholder
- Age 55 or older (regardless of when during the year an accountholder turns 55)
- Not enrolled in Medicare (if an accountholder enrolls in Medicare mid-year, catch-up contributions should be prorated)

Spouses who are 55 or older and covered under the accountholder's medical insurance can also make a catch-up contribution into a separate HSA in their own name.

Signature

By signing below, I hereby authorize a refund of the excess contribution and earnings as specified above.

Signature:

Date: