HSA BANK
National Leader in Health Savings Accounts.
A Division of Webster Bank, N.A., Member FDIC

Business Relations Update

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December 2009

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Year-End Information

The following materials will be sent to accountholders in the coming months to assist them with filing their HSA-related Federal Income Tax Return.

- **The Year-end Status Report** is provided by HSA Bank as of December 31, 2009 and mailed with accountholder statements in January 2010. It is available online through Internet Banking. The report reflects HSA activity with HSA Bank for 2009. If the accountholder transferred or rolled over funds from another institution, any transactions with the prior institution will not be reflected in this report. This report does not need to be filed with the IRS, it is only to assist the accountholder in filing their Federal Income Tax Return.
- **An IRS Form 1099-SA** is provided by HSA Bank as of December 31, 2009 and mailed with the accountholder statements in January 2010. This form reflects distribution activity throughout 2009.
- **A W-2** is provided by the employer, this form provides the total pre-tax contributions made to the HSA. The pre-tax contributions will include any employer contributions and employee pre-tax contributions.
- **An IRS Form 5498-SA** is completed by HSA Bank as of December 31, 2009 and mailed to the accountholder in January. Then sent to the IRS between April 15, 2010 and May 31, 2010. This form serves as a confirmation of the total contributions attributable to tax year 2009. Reminder: Accountholders have until April 15 to make contributions for the prior year. Those accountholders making 2009 contributions in 2010 will receive another 5498-SA in May.
- **An IRS Form 8889** is available on the IRS website (http://www.irs.gov/pub/irs-dft/f8889--dft.pdf). This form must be completed and attached to the accountholder's IRS Form 1040 when filing their Federal Income Tax Return.

Important: Tax documents for accountholders who have elected to only receive e-statements will be posted to Internet Banking in January. The accountholder will receive an email notification when the documents are available.

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Pre-filled Employer Sign-Up Forms

Your Agent Identification Number (AIN) is your connection to all accounts you have referred to HSA Bank. That's why it is so important that your employer groups sign up for their HSAs with your AIN. To help facilitate this process, we have prefilled the Employer Sign-Up Form with your AIN. When an employer group signs up with HSA Bank using your pre-filled Employer Sign-Up Form we will add your AIN to their online enrollment link. All HSAs under that employer will automatically be tied to your AIN.

To access your prefilled Employer Sign-Up Form log into the HSA Bank Business Relations section of the website. Select *Reorder Materials* from the menu bar. Next to the *Employer Sign-Up Form* click the print icon. The Employer Sign-up Form will open in Adobe Reader. You can now save or print the document to provide to all new employer groups.

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Meet Donna Woerner

HSA Bank would like to announce the expansion of Donna Woerner's service area. Previously, Donna focused her experience and knowledge in Connecticut, Delaware, Maryland, New Jersey, New York and Pennsylvania. With the continuous growth of the HSA industry, Donna has expanded her foot print to ensure that each state in our northeast region receives personal, professional guidance from HSA Bank. In addition to her previous states, Donna will now provide support and expertise in:

- Maine
- Massachusetts
- New Hampshire
- Ohio
- Rhode Island
- Vermont
- Virginia
- Washington DC
- West Virginia

Donna joined HSA Bank in 2007 as the assistant vice president for the Northeast. She has an extensive background in administering self insurance programs for large national clients with an emphasis in employee benefit programs and consumer-driven healthcare. She is an active member of NAHU, Insurance Woman of America and volunteers her time with the Big Brother/Big Sister organization. Donna received her bachelor's degree in business administration from Rutgers University.

Donna currently resides in New Jersey and can be contacted by phone at (201) 306-1209 or by or via email at dwoerner@hsabank.com

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HSA Bank Holiday Hours

HSA Bank's hours of operation during the holiday season are:

December 24, 2009 – 7:00 a.m. – 12:00 p.m., CT
December 25, 2009 – Closed
December 31, 2009 – 7:00 a.m. – 3:00 p.m., CT
January 1, 2010 – Closed

Remember that accountholders, employers and agents can still access their HSA Bank related information 24 hours a day 7 days a week by logging in to their prospective portals (Internet Banking, Employer Administration Area, or Business Relations site).

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