



Health Savings Account Excess Contribution Removal Form



ACCOUNTHOLDER INFORMATION			
Name:		Account Number (8 digits from Welcome Kit or Statement):	
Street Address:	City:	State:	Zip Code:
Phone:		Social Security Number:	

Funds contributed in excess of your contribution limit are subject to penalty and tax unless the excess and earnings are withdrawn by you prior to the due date, including any extensions, for filing your Federal Income Tax return. You should consult a qualified tax advisor in connection with your excess contribution removal.

Note: The Internal Revenue Service requires HSA Bank to report withdrawals that are considered refunds of excess contributions. In order for the withdrawal to be accurately reported, you may not withdraw the excess directly. Instead, you must request an excess contributions refund by faxing or mailing this signed and completed form to HSA Bank, using the address or fax number listed below. We will forward a check to you for the amount indicated below, plus any applicable earnings.

A \$25 excess contribution removal fee will be deducted from your account.

EXCESS CONTRIBUTION INFORMATION			
My Excess Contribution Amount	Tax Year	Refund My Excess Contribution?	Apply Excess Contribution to My Current Year's Contribution?
		<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No

Health Savings Account (HSA) contribution maximums are determined by the IRS and are no longer based on your deductible. For more information, please visit the U.S. Department of the Treasury website: <http://www.treasury.gov/resource-center/faqs/Taxes/Pages/Health-Savings-Accounts.aspx>.

YEARLY CONTRIBUTION MAXIMUMS		
Coverage	2017 Contribution Maximum	2018 Contribution Maximum
Single	\$3,400	\$3,450
Family	\$6,750	\$6,900

Catch-Up Contribution: Accountholders who meet the qualifications noted below are eligible to make an HSA catch-up contribution of \$1,000. This is in addition to the maximums noted above.

- Health Savings 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)

Authorized Signers who are 55 or older must have their own HSA in order to make the catch-up contribution. If you have questions regarding excess contributions, please contact our Client Assistance Center at 800-357-6246.

By signing below, I hereby authorize a refund of the excess contribution specified above, plus any earnings on the requested amount.

Customer Signature

Date

P.O. Box 939, Sheboygan, WI 53082-0939
 605 N. 8th St., Ste. 320, Sheboygan, WI 53081-4525
 Phone: 800-357-6246 | Fax: 877-851-7041
 Website: www.hsabank.com | Email: askus@hsabank.com