

HSA CONTRIBUTION FORM

HSA ACCOUNT OWNER'S NAME AND ADDRESS			HSA TRUSTEE'S OR CUSTODIAN'S NAME AND ADDRESS	
			Avidia Bank 42 Main St Hudson MA 01749	
Social Security Number	Date of Birth	Home Phone	HSA Account Number	Trustee's or Custodian's Phone Number
				1-800-508-2265

CONTRIBUTION INFORMATION				
Contribution	Contribution	Contribution For Tax Year*	Contribution Type	
			Regular	Rollover

SPECIAL INSTRUCTIONS		SIGNATURE	
<p>Rules And Conditions Applicable To Contributions</p> <p>Various types of contributions may be made to your Health Savings Account (HSA). Federal law limits the amount which may be contributed and the date by which such contributions may be made. By properly completing this form you are authorizing the Trustee or Custodian to accept the HSA contribution described on this form and you are certifying that you are eligible to make such contribution. HSA contribution rules are often complex. If you have any questions regarding a contribution, please seek a competent tax professional.</p> <p>An HSA allows for tax deductible contributions and tax-free distributions if amounts are used for qualifying medical expenses.</p> <p>REGULAR</p> <p>The total amount you may contribute to an HSA for any taxable year cannot exceed the applicable limit for that year. In addition, if you are age 55 or older by the end of the taxable year, you are eligible to make additional catch-up contributions to your HSA for that year. Qualified HSA funding distributions taken from your IRA and directly deposited to your HSA are also reported as regular HSA contributions. Refer to IRS Publication 969, Health Savings Accounts and Other Tax-Favored Health Plans, for more information. This publication is available from your local IRS office, on the IRS Internet Website at www.irs.gov,</p> <p>ROLLOVER AND TRANSFER</p> <p>Rollover and transfer are terms used to describe tax-free movements of cash or other property to your HSA. A rollover is permissible only once per year, the trustee sends you the money, and you must deposit it into your new HSA within 60 days.. Unlike a rollover, a trustee-to-trustee transfer can happen as often as you'd like. The transfer happens directly between the providers/custodians.</p> <p>MISTAKEN DISTRIBUTION</p> <p>An HSA Trustee or Custodian may or may not allow the return of mistaken distributions. The Trustee or Custodian may rely on the HSA Account Owner's representation that the distribution was, in fact, a mistake. Mistaken distributions that are redeposited are not reportable.</p>		<p>I certify that the deposit described above is eligible to be contributed to the HSA and I authorize the deposit/investment in the manner described above. I certify that all of the information provided by me is correct and may be relied upon by the Trustee or Custodian.</p> <p>(HSA Account Owner) _____ (Date) _____</p>	
<p>Please return this completed form along with a check, money order or draft payable to Avidia Bank and mail to:</p> <p style="text-align: center;">Avidia Bank PO Box 370 Hudson MA 01749</p>			