



AMERICAN BENEFITS GROUP

HEALTH FSA – FORFEIT CARRYOVER BALANCE

Carryover Provision

Your employer has implemented the Carryover Provision on your Health Flexible Spending Account, this allows a certain amount of your Health FSA balance to roll into your new Plan Year. However, for the new plan year you have elected the HDHP and indicated you would like to contribute to an HSA. IRS regulations state that if you have a Health FSA balance at the end of the current plan year you are not eligible to contribute to your HSA. Therefore if you would like to contribute to your HSA then you will need to forfeit the funds in your Health FSA.

Name: _____ Last Four Digits of SSN: _____

Employer: _____

Plan Year: _____ Remaining Balance: _____

I would like to forfeit my remaining Health FSA balance so that I qualify to contribute to an HSA.

Employee Signature: _____ Date: _____

---- Please Submit This Form to Your HR Department ----

Employer Signature: _____ Date: _____

Fax: 877-723-0147 or email to processing@amben.com

Mail to: American Benefits Group • PO Box 1209, Northampton, MA 01061-1209 • 800-499-3539

