

Health Savings Account Frontline Fundamentals

October 22, 2018 – Holiday Inn, Fargo ND

HSA Frontline Fundamentals is a half-day workshop that gives attendees a basic foundation of HSA knowledge. Exercises are included to help participants apply information to real-world scenarios. Attendees will leave this session able to confidently process basic HSA transactions. This is a beginner's session; no previous knowledge is assumed.



Introduction to HSAs

- Explain the benefits of an HSA
- Define high deductible health plan requirements
- Recognize the HSA eligibility requirements

Establishing an HSA Fundamentals

- Summarize the process for establishing an HSA
- Examine the required documents to establish an HSA

HSA Funding Fundamentals

- Define the contribution limits and the deadline
- Describe the last month rule and the testing period rules
- Ensure accurate regular contribution reporting

HSA Distributions Fundamentals

- Summarize the tax consequences of qualified and nonqualified distributions
- Describe a mistaken distribution
- Ensure accurate distribution reporting

HSA Portability Fundamentals

- Distinguish the rules for transfers and rollovers
- Ensure accurate rollover reporting

Who Should Attend

You should attend this seminar if you need to learn the basics of HSAs.

Schedule

12:00-12:30 p.m.	Registration and Light Lunch
12:30-4:30 p.m.	Program
4:30 p.m.	Adjourn

Seminar Location

Holiday Inn
3803 13th Ave S
Fargo ND 58103
Phone: 701.282.2700

Questions?

Call NDBA's SVP of Education Dorothy Lick at 701.223.5303.

NDBA Registration Form HSA Frontline Fundamentals • October 22, 2018

Registration Information

Register early and save!

	<u>Advance</u>	<u>After 10/1</u>
Registration	\$175	\$195

Send form with payment to:

North Dakota Bankers Association
Attn: Registration
PO Box 1438
Bismarck ND 58502-1438

Or **Register online** at www.ndba.com

Bank: _____

Address: _____

City/State/Zip: _____

Phone: _____

Registrants

1. _____

Branch location (if different): _____

Email: _____

2. _____

Branch location (if different): _____

Email: _____

3. _____

Branch location (if different): _____

Email: _____

Total:

- Please send an invoice.
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