

Aetna HealthFund[®] Health Savings Account (HSA)



HSA Enrollment Instructions

This instruction sheet outlines the necessary actions you need to take to enroll in the Aetna HealthFund HSA. By completing and signing the HSA Enrollment Form, you are selecting Aetna as your HSA custodian and requesting Aetna to open an HSA on your behalf.

Please Note: Your enrollment kit may also include information about enrolling in your medical and/or dental benefits. You may need to complete additional forms to enroll in those benefits as well.

TO ENROLL IN THE AETNA HEALTHFUND HSA, PLEASE COMPLETE THESE STEPS:

1. Read the *Health Savings Account Custodial Agreement* carefully and save this document for your records.
2. Complete and sign the *Enrollment Form*, if applicable. Return the completed Enrollment Form to your HR representative or as directed. If you have been instructed to enroll in your HSA online or by phone, you do not need to complete the paper enrollment form. Please do not submit an HSA contribution at this time.
3. Complete the *Beneficiary Designation Form* and the *Electronic Funds Transfer Form (EFT)*, if applicable. Mail these forms to the address indicated on the form. If you wish to make contributions by check, deposit slips will be included in your HSA Welcome Kit, which you will receive once your HSA is open.
4. Be sure to make a copy of these forms for your records.

Thank you for choosing Aetna!

The HSA Visa Debit Card and HSA Checkbook administration support are provided by JPMorgan Chase Bank, N.A. ("Chase"). You may receive communications that reference the Chase name, where appropriate.

Aetna is the brand name used for products and services provided by one or more of the Aetna group of subsidiary companies. Benefits provided in connection with Aetna HealthFund HSA are underwritten or administered by Aetna Life Insurance Company. Please read your benefits materials carefully.

Health Savings accounts are not insured benefits. Credited interest rates are subject to change. Aetna HealthFund HSA withdrawals are to be used for qualified expenses. Withdrawals will be made at the Account Holders' discretion. Withdrawals that are not for qualified expenses are taxable and will be subject to penalty taxes in certain circumstances.