



Health Savings Accounts (HSAs) Frontline Fundamentals



Half-Day Workshop

March 16, 2020 – Courtyard by Marriott, Bismarck ND

HSA Frontline Fundamentals is a half-day workshop that gives 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 HSA knowledge is assumed.



Introduction to HSAs

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

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

Courtyard by Marriott Hotel

3319 N 14th St

Bismarck ND 58503

Phone: 701.223.6667

Roomrate: \$139 Deadline to reserve rooms: Feb. 14

Continuing Education Credits

This HSA workshop may be eligible for insurance continuing education credits. Please call NDBA for details.

Who Should Attend?

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

Questions?

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

NDBA Registration

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Registration Information

Register early and save!

	<u>Advance</u>	<u>After 2/14</u>
Registration	\$175	\$195

Bank: _____

Address: _____

City/State/Zip: _____

Phone: _____

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

Registrants

1. _____

Branch location (if different): _____

Email: _____

2. _____

Branch location (if different): _____

Email: _____



Questions?

Call NDBA at 701.223.5303.

Total:

- ☐ Please send an invoice.
- ☐ Check enclosed.
- ☐ I'd like to pay by credit card. Please contact me.