

Account Types: Savings HSA Checking HSA Debit Card

IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW ACCOUNT: To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify and record information that on personal accounts identifies each person who opens an account. In addition on legal entity accounts, we will require identification on beneficial owners and controlling person.
What this means for you: When you open an account, we will ask for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

HSA Verification	Yes	No
• Are you currently enrolled in a health/medical plan that is NOT through your employer?	<input type="checkbox"/>	<input type="checkbox"/>
• Is this other health/medical insurance a High Deductible Health Plan (HDHP)?	<input type="checkbox"/>	<input type="checkbox"/>
• Are you currently enrolled in Medicare or Medicaid?	<input type="checkbox"/>	<input type="checkbox"/>
• Are you ELIGIBLE to be claimed as a dependent on another person's tax return?	<input type="checkbox"/>	<input type="checkbox"/>
• Have you received any Veterans Administration Health Benefits in the last 3 months?	<input type="checkbox"/>	<input type="checkbox"/>

What type of HDHP coverage are you electing?
 Employee Only Employee & Child(ren) Employee & Spouse Family

Eligibility for Membership: _____

Accountholder

Name: _____

Address: _____

City, ST, Zip: _____

Social Security: _____

Birth Date: _____

Personal Email: _____

Mobile Phone: _____

Home Phone: _____

Employer: _____

Special Note:

If you have elected Employee & Spouse or Family Coverage, please review the HSA Agent Authorization Form enclosed.

TIN Certification and Backup Withholding Information
 Under penalties of perjury, I certify that:

- 1) The number shown on this form is my correct Taxpayer Identification Number (or I am waiting for a number to be issued to me) and
- 2) I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholdings as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am not longer subject to backup withholding, and
- 3) I am a U.S. person (including a U.S. resident alien)

Certification Instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN.

AUTHORIZATION

By signing below, I agree to the terms of the Membership and Account Agreement, Truth-in-Savings Rate and Fee Schedule, E- Sign Act, Funds Availability Policy Disclosure, if applicable, and to any amendment the Credit Union makes from time to time which are incorporated herein. I acknowledge receipt of a copy of the Agreement and Disclosures applicable to the accounts and services requested herein. If an access card or EFT service is requested and provided, I agree to the terms of and acknowledge receipt of the Electronic Funds Transfer Agreement. The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

<input checked="" type="checkbox"/> _____ Signature	_____ Date
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For Credit Union Use Only

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| <input type="checkbox"/> OFAC | <input type="checkbox"/> HSA Checking | <input type="checkbox"/> \$5 Deposit |
| <input type="checkbox"/> Membership | <input type="checkbox"/> Primary DC | <input type="checkbox"/> Checks Ordered |