



Optum Bank Health Savings Account Authorization Form

Employee Name _____ Rocket # _____ Main Campus Health Science Campus

By clicking "I agree" below, you're confirming the following:

1. I cannot be claimed as a tax dependent on someone else's tax return.
 I Agree I Disagree
2. I am not enrolled in Medicare or Tricare.
 I Agree I Disagree
3. I am not covered under any other health plan that is not a High Deductible Health plan.
 I Agree I Disagree

In addition, by agreeing to the following terms and conditions, The University of Toledo will be able to open an HSA on your behalf. If you do not agree, an HSA will not be opened for you.

1. I would like to open a **Optum Bank HSA** and I'm eligible to contribute to an HSA
2. I authorize The University of Toledo to act as my agent to open a **Optum Bank HSA** for me and to send my name, residential address, date of birth, SSN/ITIN, phone number, email address, country of citizenship, and residency status to **Optum Bank**. As my agent, The University of Toledo will receive a notice from **Optum Bank** on my behalf which explains that **Optum Bank** will obtain, verify and record information to identify me before they open my HSA. **Optum Bank** does this to help the United States government fight money laundering activities and terrorism funding.

I agree that The University of Toledo will be my agent until the first of these events occurs:

- I receive my HSA welcome packet from **Optum Bank**
- I give The University of Toledo written notice that I do not want The University of Toledo to act as my agent and The University of Toledo has enough time to act on my notice
- I receive a notice from **Optum Bank** that my application for an HSA has been declined

Once your account is opened, you'll receive a welcome packet in the mail with information about using your HSA, creating an online account, and the agreements governing your account. If you no longer want an HSA, you'll have seven business days after receiving your welcome packet to cancel the account.

If you have any other questions or would like to review the agreements, visit optumbank.com or call 1-866-884-7374. Member FDIC.

I Agree I Disagree

Employee Signature

Date

If you wish to contribute to the Health Savings Account on an individual basis, you must elect this contribution each year. As you did not complete the online open enrollment, this must be done on a hard copy which can be found on the Human Resources Website.

Human Resources

Mail Stop 205 • 2801 W. Bancroft St. • Toledo, Ohio 43606-3390
419.530.4747 Phone • Email: Benefits@utoledo.edu

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