

This 3½ hour workshop is dedicated to Health Savings Accounts (HSAs). This workshop will discuss the advantages of offering them at your credit union and how to start a program if you don't already have one.

Program Agenda for the HSA Workshop

- **What is an HSA?** Review the description of the account and explain the benefits to the credit union and the member.
- **HSA Eligibility:** Learn about the requirements to contribute to an HSA.
- **HSA Contributions and Distributions:** Define the contribution limits and the deadline for contributions. Examine qualified medical expenses as related to the account.
- **Tax Reporting for HSAs:** Identify the tax reporting requirements for the 1099-SA and 5498-SA.
- **HSA Death Claims:** Discuss options beneficiaries will have when an HSA account owner passes away.