

**HSA CONTRIBUTION DIRECTION
(FORM 2615H)**

Please Print or Type

CUID (Credit Union will complete)

Credit Union Name

____-____-_____
Social Security Number

HSA Suffix

Account Owner's Name (First, Initial, Last)

Account Number

GENERAL INFORMATION

A contribution made to an HSA between January 1 and the tax return due date (usually April 15) is treated as a contribution for the current year unless you provide us with a written instruction to treat it as a contribution for the preceding year. Please tell us the tax year to which your contribution applies by completing and signing this form.

Use the **HSA Rollover and Transfer Contributions Form (2614H)** for a direct transfer, rollover, or direct rollover from an HSA, Archer medical savings account (MSA), health flexible spending account (FSA), or health reimbursement arrangement (HRA).

CONTRIBUTION AMOUNT AND TAX YEAR

\$ _____
Amount of Contribution

Tax Year to Which Contribution Applies (YYYY)

DIRECT ROLLOVER FROM MY TRADITIONAL IRA

The fiduciary of my traditional IRA is directly transferring money to my credit union HSA.

An eligible individual can use a direct rollover to move money from most traditional IRAs to an HSA. The exceptions are that the money cannot come from an IRA that will receive SEP or SIMPLE contributions from an employer whose tax year ends during the individual's tax year. You make this type of direct rollover by instructing the fiduciary of the transferring traditional IRA to directly transfer the money to the

fiduciary of the receiving HSA. You should set up the HSA that will receive the direct rollover before you start the direct rollover. This type of transaction is treated as a regular HSA contribution, and it reduces the other regular HSA contributions that can be made for the year in which the transaction occurs. An individual can generally make this type of direct rollover only once in a lifetime.

\$ _____
Amount of Contribution

A direct rollover from a traditional IRA can only be applied as a regular contribution to the current tax year.

ACCOUNT OWNER'S SIGNATURE

X _____
Account Owner's Signature

Date (MM/DD/YYYY)

For Credit Union Use Only

Name of Credit Union Employee Who Took Deposit

Date of Deposit (MM/DD/YYYY)