



# Health Savings Accounts: A-Z (Webinar)

March 12, 2018 ☐ 3:30pm – 5:00pm

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Health Savings Accounts, friend or foe? Customers like the HSA but does the financial institution? Why not? Find out the good, the bad and the ugly of Health Savings Accounts. This webinar is designed to enable you to answer most customer questions about HSAs as well as to open, document and report these products correctly. Learn about eligibility rules, contribution rules and distributions from Health Savings Accounts.

This program will enable you to answer most account holder questions about HSAs and to open, document and report these products correctly. As a bonus- You will receive the 500+ page HSA Handbook that explains this and more for your reference.

## What you will learn:

- Background and key points on Health Savings Accounts
- What is a high deductible health plan
- Eligibility and contribution rules
- Testing period and consequences for not meeting the testing period
- Customer tax issues on contributions
- Moving and changing HSAs
- IRA to HSA rollover
- Insurance Issues
- Distributions
- IRS Reporting

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## Who Should Attend

This informative session is designed for customer service representatives, personal bankers, new accounts, compliance, IRA personnel, frontline personnel.

## Webinar Speaker



**Deborah Crawford** is the President of gettechnical, inc. a Baton Rouge-based firm, specializing in the education of banks and credit unions across the nation. Her 27+ years of banking and teaching experience began at Hibernia National Bank in New Orleans. She graduated from Louisiana State University with both her bachelor's and master's degrees. Deborah's specialty is in the deposit side of the financial institution where she teaches seminars on regulations, documentation, insurance and Individual Retirement Accounts.



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## Registration Form

Please make copies of this form if more connections are needed.

### Connection 1

Mr./Mrs./Ms. \_\_\_\_\_  
 Bank \_\_\_\_\_  
 Email Address \_\_\_\_\_  
 Branch Street Address \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Fax \_\_\_\_\_

### Connection 2

Mr./Mrs./Ms. \_\_\_\_\_  
 Bank \_\_\_\_\_  
 Email Address \_\_\_\_\_  
 Branch Street Address \_\_\_\_\_  
 City, State, Zip \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Fax \_\_\_\_\_

### Payment Options

☐ Check ( Made payable to Louisiana Bankers Association)

☐ Visa   ☐ MasterCard   ☐ American Express

Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Name on Card (please print) \_\_\_\_\_ Signature \_\_\_\_\_

Billing Address: \_\_\_\_\_ Amount to be charged on card \$ \_\_\_\_\_

☐ I cannot participate in the live program.

Please send me the recording.

☐ \$165 (LBA members)

☐ \$265 (non-members)

\*Recording and materials will be emailed  
after the program

☐ This training will be covered under SBET (Small Business Employee Training Program). Please provide an email address on the line below to receive the necessary documentation for reimbursement:

\_\_\_\_\_

**\*Please Note: Recordings are not eligible for SBET funding**

### Registration Fee

\$165 per connection, LBA members  
\$265 per connection, nonmembers

Submit registration and view rosters in the  
Education Section of LBA's Website, [www.lba.org](http://www.lba.org).

### Agenda

3:30 p.m. Webinar Begins  
5:00 p.m. Webinar Adjourns

Louisiana Bankers Association  
5555 Bankers Avenue  
Baton Rouge, LA 70808  
225-387-3282  
Fax 225-343-3159

**Webinar access codes will be sent to registrants  
with confirmation emails one week prior to session.**