



# Health Savings Account Update and Review (Webinar)

March 25, 2021 ☐ 10:00am - 11:30am

Health Savings Accounts, friend or foe? Account holders like HSAs, but does the financial institution? Find out the good, the bad and the ugly of Health Savings Accounts. This webinar is designed to enable you to answer most account holder questions about HSAs as well as open, document and report these products correctly. Learn about eligibility rules, contribution rules and distributions from Health Savings Accounts.

## Program Topics:

- Background and key points on HSAs
- 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
- Distribution
- RS Reporting

## Who Should Attend:

This webinar will benefit all customer service representatives, personal bankers, new accounts, compliance, IRA personnel and 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.

## Webinar Registration:

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

## Payment Options:

Check ( Made payable to Louisiana Bankers Association)  
 Visa  MasterCard  American Express  
 Card Number \_\_\_\_\_  
 Expiration Date \_\_\_\_\_ Amount to be charged: \_\_\_\_\_  
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## Please check:

### Registration Fees for LBA Members

- Live Webinar Connection \$165 per connection
- Webinar Recording \$165 per recording

### Registration Fees for Non-Members

- Live Webinar Connection \$265 per connection
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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:

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

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

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