

HSA Self Registration



Welcome to Associated Benefits Connection®!
We're glad you're here.

This guide has been developed for:

THOMAS ALLEN COMPANY INC

Health Savings Account (HSA) Self Registration

Employer Specific Code: CV1032

Online Enrollment

Congratulations on making a smart financial decision by choosing to open a Health Savings Account in connection with your employer's high-deductible health plan (HDHP).

Getting Started

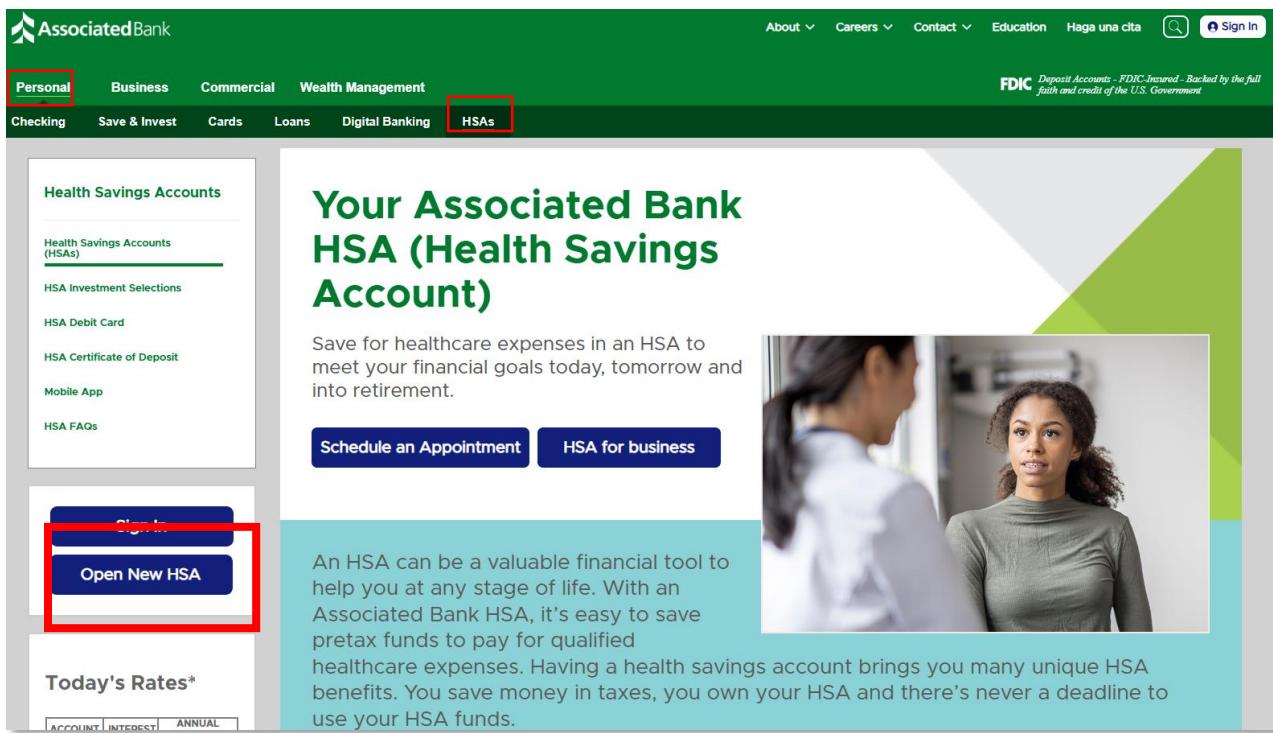
You will need to be prepared with the following

- Computer with internet access
- Driver's License information
- Your employer specific code (above)



Instructions for enrolling in your Health Savings Account

1. Go to AssociatedBank.com
2. Under the Personal Tab – Select HSAs
3. Select “Open New HSA”



The screenshot shows the Associated Bank website's navigation bar with 'Personal' highlighted. Below it, a sidebar lists 'Health Savings Accounts (HSAs)', 'HSA Investment Selections', 'HSA Debit Card', 'HSA Certificate of Deposit', 'Mobile App', and 'HSA FAQs'. A large red box highlights the 'Open New HSA' button. The main content area features a woman and a doctor, with text about the benefits of an HSA.

Your Associated Bank HSA (Health Savings Account)

Save for healthcare expenses in an HSA to meet your financial goals today, tomorrow and into retirement.

[Schedule an Appointment](#) [HSA for business](#)

An HSA can be a valuable financial tool to help you at any stage of life. With an Associated Bank HSA, it's easy to save pretax funds to pay for qualified healthcare expenses. Having a health savings account brings you many unique HSA benefits. You save money in taxes, you own your HSA and there's never a deadline to use your HSA funds.

Online Application – Self Registration

1. Are you a current Associated Bank Customer? Yes or No

 Associated Bank

FDIC Deposit Accounts - FDIC-Insured - Backed by the full faith and credit of the U.S. Government

You're applying for:
 Health Savings Account (HSA)

Getting started

You'll need to be:

- At least 18 years old
- A legal resident of the United States

Have these things ready:

- Social Security number
- Driver's license or photo ID
- Physical address (PO box not accepted)

Are you a current Associated Bank customer?

Yes
 No

 **USA Patriot Act Notice**
Important Information about opening a new account. To help the government fight the funding of terrorism and money laundering activities, federal law requires us to obtain, verify and record information that identifies each person who opens an account. **What this means to you:** when you open a new account, we will ask for your name, address, date of birth and other information that will allow us to identify you. You must be a US Citizen or Permanent Resident Alien with a local address and be 18 years or older to apply.

2. Enter Personal Information, acknowledge disclosure, and Start Application

Are you a current Associated Bank customer?

Yes
 No [Start your application by entering your details.](#)

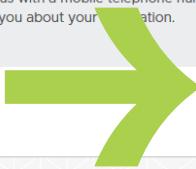
Personal information 

First name * Last name *

Primary phone * Personal email *

I have read the Electronic Notice and Agreement and I agree and consent to receive electronic copies of all documents and disclosures provided to me in connection with this application. [Electronic Notice and Agreement*](#)

Your agreement to be contacted
We, Associated Bank, N.A., may need to contact you about your application even if you do not submit it. By selecting "Start Application", you agree that we may contact you at the phone number or email address you enter on your application even if you previously asked us not to contact you or have requested your phone number with a state or federal "Do Not Call" registry. If you provide us with a mobile telephone number, you agree that we may contact you at that number even if your mobile telephone carrier charges you for the call. We will only contact you about your application.



Start application

Online Application – Self Registration

3. Review Eligibility

 Enrollment details
Health Savings Account (HSA)

Let's make sure you're eligible 

You're eligible to open an HSA if you are:

18 or older
 A U.S. citizen or legal resident

Did you know? Even if you aren't eligible to contribute to an HSA right now, you can still open one. The IRS sets the rules, but you can learn more on our [FAQ page](#).

4. Select Yes, and I have a code – enter code and click Submit code

Setting up your HSA 

Are you opening your HSA through your employer? 

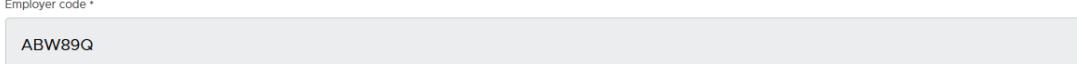
Yes, and I have a code
 Yes, but I don't have a code
 No, I'm opening it on my own

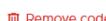
Please enter the bank-issued employer code in the field below.

Employer code * 

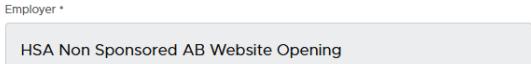
 

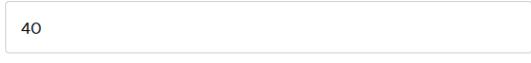
After submit, employer name will appear

Employer code * 



Employment information

Employer *  Job title * 

Hours per week * 



Online Application – Self Registration

5. Fill out basic information

Primary applicant
Amanda W Test

Basic information

First name * Amanda

Middle name W

Last name * Test

Suffix

Date of birth (MM/DD/YYYY) * 01/01/1980

Citizenship * US citizen

Current address

Street address * 433 Main St

Apt., suite, unit, etc.

City * Green Bay

State/Province * Wisconsin

Zip/Postal code * 54301-5114

Contact information

Primary phone type * Mobile

Primary phone * (262) 555-5555

Personal email * noemail@associatedbank.com



Mobile phone and email are required for HSA online access

Online Application – Self Registration

5. Continued, fill out basic information and click Next

Tax identification

Social Security number *

XXX-XX-3333

Identification

Please select identification type *

Drivers License

Identification number *

S3642-4589-4587-99

State Issued *

Wisconsin

Issue date (MM/DD/YYYY) *

01/01/2020

Expiration date (MM/DD/YYYY) *

01/01/2050

[Previous](#)

[Next](#)

 [Cancel application](#)

 [Save my progress](#)

If needed, you can save your progress,
just click “save my progress” and
continue when you are able

Online Application – Self Registration

6. Fund your account – This will be available after completing the enrollment. Please review and hit Next.

 Fund your account

No rush - you can contribute funds whenever you're ready.

After you finish the application, you will receive a confirmation email with more information on ways to contribute to your Health Savings Account.

[Previous](#) [Next](#)

[Cancel application](#) [Save my progress](#)

[Co-Browse](#) [Equal Opportunity Lender](#)

7. Review enrollment details – make any edits needed

 Enrollment details
Health Savings Account (HSA) 

Setting up your HSA 

Are you opening your HSA through your employer? * 

Yes, and I have a code

Please enter the bank-issued employer code in the field below.

Employer code *

ABW89Q

Employment information

Employer *	Job title *
HSA Non Sponsored AB Website Opening	Employed
Hours per week *	
40	

Health plan coverage 

Who does your health plan cover? *

Individual

Online Application – Self Registration

9. Review and accept disclosures

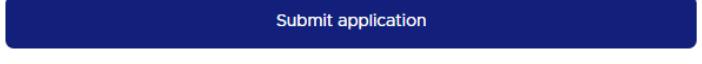
After you finish the application, you will receive a confirmation email with more information on ways to contribute to your Health Savings Account.

 Disclosures
Health Savings Account (HSA)

Accept all 

- I / We have read the Electronic Notice and Agreement and I / We agree and consent to receive electronic copies of all documents and disclosures provided to me / us in connection with this application. [Electronic Notice and Agreement](#)*
- I / We have read and agree to the terms and conditions of the [Privacy Policy](#)*
- I promise that everything I've shared is true and correct. The people helping me with this HSA can trust the information I have provided.*
- I understand that it's my job to make sure I'm allowed to put money into an HSA. I know I need to
 - Make sure I'm eligible to contribute each year.
 - Keep my contributions within the yearly limit based on the rules and my health plan.
 - Understand any taxes that could apply if I add or remove money from the HSA (including rollovers).
 - Talk to a tax or legal expert if I have questions about eligibility, limits, or taxes.*
- I understand that no one at Associated Bank is giving me tax or legal advice. If I need help with that, I'll talk to my own tax or legal professional. I also agree that the people helping me with my HSA aren't responsible if something goes wrong because of decisions I make.*
- I have read and agree to the terms and conditions of the [HSA Custodial Agreement](#)*
- I have read and agree to the terms and conditions of the [HSA Fee Schedule - Retail](#)*
- I have read and agree to the terms and conditions of the [HSA Cash Account Interest](#)*
- I have read and agree to the terms and conditions of the [HSA Participant Portal Guide](#)*

- I have read and agree to the terms and conditions of the [English Only Legal Documents Disclosure](#)*

 Submit application

Don't worry! Your HSA portal will have all disclosures available.

Online Application – Self Registration

10. Account Summary

 Associated Bank

FDIC Deposit Accounts - FDIC-Insured - Backed by the full faith and credit of the U.S. Government



Start enjoying the benefits of your new account(s):

Health Savings Account (HSA) SUBMITTED

Account summary

Almost done!

 We're putting the finishing touches on your account! You'll receive an email to confirm your HSA will be ready soon (usually within one business day). While you wait, download the mobile app¹ on [iOS](#) or [Android](#) for anytime, anywhere access!

 Keep an eye out for your debit card Your HSA Debit Mastercard® will arrive by mail within 14 business days. Once it arrives, call the number on the sticker to activate your card and set a PIN. You'll be able to use your card right away for eligible health expenses! And remember, when you use your HSA debit card at an Associated Bank ATM it's always fee-free.



Contact us

Have questions? Our U.S.-based team of certified account managers is happy to help! Call us at [800-270-7719](#) from 7 a.m. - 7 p.m. CT.

¹Associated Bank does not charge a fee to download our digital applications; however, transactional fees may apply. Carrier message and data rates may apply; check your carrier's plan for details. Visit [AssociatedBank.com/disclosures](#) for Terms and Conditions for your service.

HSA cash balances are FDIC Insured up to the Standard Maximum Deposit Insurance Amount (SMDIA). Deposit products are offered by Associated Bank, N.A. Member FDIC.

Reference ID : SUB-0771324

- 1 Watch for your enrollment confirmation email 
- 2 Once your account is ready, you will receive an email with how to log in
- 3 Don't forget to switch to estatements to save \$4 a month!

 AssociatedBank | Your money works here.

Your enrollment has been submitted Amanda,

Almost done! We are hard at work completing your request. You will receive an email within the next business day confirming when your Health Savings Account is ready.

Product: Health Savings Account
Account Number: Forthcoming

HSA Debit Mastercard®
 You will be receiving your HSA Debit Mastercard® in the mail within 14 business days of your enrollment.

We're here for you
 Call our US-based team of certified account managers at 1-800-270-7719 from 7 a.m. – 7 p.m. CST to get your questions answered.

For your records, we are providing the following disclosures related to your new account:

[Electronic Notice Disclosure and Agreement](#)
[Privacy Policy](#)

HSA Custodial Agreement & Disclosures, see attached
 HSA Fee Schedule, see attached
[HSA Interest Information](#)