

Health Savings Accounts

A web-based seminar
Thursday, March 29th, 2012,
9:00 AM–11:00 AM Mountain



WYOMING BANKERS ASSOCIATION

200 East 8th Ave.

P.O. Box 2190

Cheyenne, Wyoming 82003

(307)638-5008 FAX(307)638-5013

Program Content:

Yes, they are still around! Were you hoping they might fade into the sunset?

Because of the high cost of health insurance premiums, more and more companies and individuals are enrolling in High Deductible Health Plans (HDHP) to reduce their health care premium costs. As they do, there is a growing need for Health Savings Accounts to pay those medical expenses until the high deductible has been met and the insurance co-pay kicks in.

Whether you are now offering HSAs or are thinking about offering HSAs, this 2 hour extremely informative webinar will give you the information you need to make sure you are setting the accounts up correctly and performing the proper maintenance and reporting.

Covered Topics:

- What is the definition of a HDHP?
- Are all HDHP participants allowed to open Health Savings Accounts?
- What are the NEW contribution limits for 2012?
- What responsibilities does the financial institution have to monitor qualified medical expense withdrawals?
- How do we handle overdrafts in an HSA account?
- What kind of account should the HSA money be invested in?
- How do we re-deposit medical expense reimbursements?

Who Should Attend:

New Account Representatives, Certificate of Deposit Personnel, Savings Counselors, Accountholder Service Representatives, Investment and Trust Personnel who are involved in the opening, selling, marketing, or administration of HSAs. Any officer/manager who "oversees" the New Account department and may be responsible for answering HSA accountholders questions or concerns but does not actually open HSA accounts.

Presenter:

Patrice M. Konarik, CFP® is president and founder of Sunwest Training Corp. located near San Antonio, TX. She has over 25 years experience in the banking industry specializing in Deposit Accounts and IRAs, and is currently providing training in these areas for many organizations on a nationwide basis. Patrice earned her BS in Management from Binghamton University in New York and her Certified Financial Planner designation in 1990.

Cancellation Policy:

Refunds will be given only for cancellations received in written form 3 business days prior to the program. If your bank is unable to participate after registering, you can also select to receive an audio CD plus a special password to see the information online of the seminar at no additional charge.

If you are unable to attend the webinar but would like to have this information for training purposes, you may also purchase an On-Demand website link and/or audio CD.

Name: _____

Bank: _____

Address: _____

City, State, ZIP: _____

Phone: _____

*Email Address: _____

**Please include an email address as this is how your webinar materials will be delivered to you.*

Please check one of the following:

- | | |
|--|-------|
| <input type="checkbox"/> "Live" Web connection | \$255 |
| <input type="checkbox"/> Additional connection for a branch | \$150 |
| <input type="checkbox"/> 6-month "On-Demand" website link only | \$255 |
| <input type="checkbox"/> Audio CD and materials only | \$285 |
| <input type="checkbox"/> Entire Package: Live, On-Demand link, and audio CD plus materials | \$395 |

Ways to Register:

ONLINE: www.bankwebinars.com

FAX: (800) 831-3776

PHONE: (800) 831-0678

MAIL: TTS, PO Box 310, Waunakee, WI 53597

Please Do Not fax registrations to the Wyoming Bankers Assoc

Method of Payment:

- Please invoice our bank
 Check made payable to TTS
 Mastercard Visa

Card Number: _____

Expiration Date: _____

Signature: _____

For assistance, please call Cheryl Johnston, (307)638-5008