

Aetna HealthFund® Health Savings Account (HSA)



HSA Enrollment Instructions

This instruction sheet outlines the necessary actions you need to take to enroll in the Aetna HealthFund® HSA. By completing and signing the HSA Enrollment Form, you are selecting Aetna Life Insurance Company as your HSA custodian and requesting Aetna to open an HSA on your behalf.

Please Note: Your enrollment kit may also include information about enrolling in your medical and/or dental insurance plan. You will need to complete additional forms to enroll in those benefits as well.

To enroll in the Aetna HealthFund HSA, please complete these steps:

- Read the *Health Savings Account Custodial Agreement* carefully and save this document for your records.
- Return the completed *Enrollment form* to your HR representative, in the pre-addressed return envelope or to the address indicated on the *Enrollment Application*. Note: Please do not submit an HSA contribution at this time. If you wish to make contributions by check, deposit slips will be included in your HSA Welcome Kit.
- Complete the *Beneficiary Designation form* and the *Electronic Funds Transfer form (EFT)*, if applicable. Return these completed forms to your HR representative, in the pre-addressed return envelope or to the address indicated on the forms.
- Be sure to make a copy of these forms for your records.

Thank you for choosing Aetna!

thank you

While this material is believed to be accurate as of the print date, it is subject to change.

We want you to know™

