A contribution made to an HSA between January 1 and the tax return due date (usually April 15) can be treated either as a contribution for the current year or as a contribution for the preceding year.

We are required to report to the IRS how you want to treat each contribution made during this time period.

Please tell us the tax year to which your contribution applies by completing and signing this form.

Do not complete this form for direct transfers or rollover contributions.

CONTRIBUTION AMOUNT AND TAX YEAR

$ ___________________________________________ _____________________________________________

Amount of Contribution Tax Year to Which Contribution Applies (YYYY)

ACCOUNT OWNER’S SIGNATURE

X ___________________________________________ ____________________________________________

Account Owner’s Signature Date (MM/DD/YYYY)

For Credit Union Use Only

Name of Credit Union Employee Who Took Deposit Date of Deposit (MM/DD/YYYY)