MEDICAL MUTUAL®

HSA Set-Up Form

(Save Form & Return electronically to Medical Mutual Sales Team)

Group Information

Group Name:

Group Address:

Group Tax ID #:

Broker Name Contact:	Phone:	Email:
Group Accounting Contact:	Phone:	Email:
Group HR Contact:	Phone:	Email:
Other Group Contact(s):	Phone:	Email:

Funding Method Options (*Choose only one*):

☐ Utilize Medical Mutual's payroll Contribution Manager system.	☐ Group will direct deposit into employee accounts.	☐ Member direct
• Employer manages payroll contribution through our self –serve portal. Medical Mutual will pull funds based on the amounts designed per employee. • Requires EFT banking form to be completed. • Ability to differentiate employer vs. employee contribution on HSA platform.	• Employer requests employee account/routing numbers from Medical Mutual. • Employer will manage HSA account deposits. • Inability to differentiate employer vs. employee contribution on HSA platform.	• No payroll contribution facilitated by employer.

If your HSA enrollment is going to be equal to or greater than 20 accounts needing to be opened, Medical Mutual can help you with this process. Please ask your Medical Mutual sales representative for more information so that we can provide you with the necessary steps and documents in helping to complete this for you and your employees.

☐ Estimate Number of HSA's needing opened: _____

Confirmation:

Group Official: _____   Date: _____

Broker Official: _____   Date: _____

Medical Mutual Information *(internal use only)*

Market Segment (Select One): ☐ 2-50   ☐ 51-99   ☐ 100+

Prepared By:	Cost Center:	Phone:	Date:
Group Account Executive Name:		Effective Date:	

Base Group Name:

Base Group Number:	Section Numbers:

Is this an existing Medical Mutual group?   ☐ yes   ☐ no

Is this group part of a consortium or association? Or does the group have multiple group numbers or bill groups?   ☐ yes   ☐ no   If yes to either, contact Product Management.

Debit Card Stock: ☐ Standard   ☐ Standard w/4th line (51+ Groups only)   Text: (26 spaces max) _____

Comments: