

Are You Eligible for HSA Advantage™ ?

See the chart below to confirm that you are eligible to enroll or put money into an HSA Advantage account. Money in any previous HSA may continue to be used for eligible expenses at any time.

Required	Yes	No
You are enrolled in a qualified High Deductible Health Plan (HDHP) that meets IRS minimum requirements for single and family deductibles	✓	
You are Eligible if Any of the Following are True		
You have a \$0 balance in your and/or your spouse's healthcare Flexible Spending Account and both plan year(s) are over	✓	
You receive Veterans Administration medical benefits for a service-connected disability or your spouse receives VA benefits	✓	
Your children and/or spouse have health coverage under an insurance plan that is not a qualified High Deductible Health Plan (including Medicare)	✓	
You are enrolled in dental, vision, disability and/or long-term care insurance	✓	
You are enrolled in a Limited Flexible Spending Account for dental and vision expenses and/or in a Dependent Daycare Flexible Spending Account	✓	
Your HDHP plan pays 100% of preventive care even before your deductible is met	✓	
You are Not Eligible if Any of the Following are True		
You are enrolled in Medicare or Medicaid or are listed as a dependent on someone else's tax return		✓
You have carried over a balance in your and/or your spouse's healthcare Flexible Spending Account, you have a balance during a Flexible Spending Account Grace Period or the plan year for you and/or your spouse is not over		✓
You have received healthcare benefits (other than dental, vision, preventive or service related) from the Veterans Administration (TRICARE) within the last three months (including prescriptions)		✓
Your spouse is enrolled in a healthcare plan (includes any Health Reimbursement Arrangement offered by an employer) that provides you with benefits before you have met the IRS minimum deductible for the year		✓
You have contributed the annual federally-set limit to another HSA or MSA this year.		✓



HSA Advantage allows you to put tax-free money aside for you and your family's current and future healthcare needs.



800.982.7715 www.chard-snyder.com

