



An Introduction to Health Savings Accounts WEBINAR

February 26, 2026 | 8:30 a.m.

HSAS: BEYOND THE BASICS

As the nationwide growth of Health Savings Accounts (HSAs) continue to rise, financial organizations are beginning to see more complex transactions due to increased customer activity. This activity requires personnel to review their existing HSA procedures to ensure transactions are handled properly. We'll explore the areas of employee eligibility, handling excess and mistaken distributions, investment diversification and product expansion, including how HSAs are being touted as a retirement savings vehicle in addition to a health care coverage option.

Attendees will learn:

- Partial eligibility rules and testing period
- Qualified HSA funding distributions
- Popular investment alternative selections
- Excess contribution correction methodology
- How to process mistaken distributions
- HSA Beneficiary options
- Distribution options after age 65
- IRS reporting requirements

DATE & TIME

8:15 a.m.	Zoom Waiting Room Opens
8:30 a.m.	Webinar Begins
10 a.m.	Webinar Adjourns

This webinar will be presented through Zoom.
We recommend that you join us via computer a PC,
Mac, iPad, iPhone or Android device.

ABOUT THE PRESENTER

Matthew Dickinson has more than 20 years in banking and retirement, and has held many titles within his career. Matt has worked for companies such as Ascensus, Merrill Lynch, Wells Fargo and Frandsen Bank and Trust. On a day-to-day basis, Matt helps financial institutions gain and maintain their knowledge base to manage their IRA portfolio. He works at a fast pace and can win clients and prospects over by how he operates – focusing on the consequences of not moving from the status quo. Matt wants to create a lifelong relationship with his customers and welcomes all questions and inquiries throughout the program. conferences and guest speaker at regional meetings.



FEES

Member Fees

\$270 per person

Fee includes presentation slides. Webinar recording not included.

All-Access Pass Fees

\$500

Fee includes webinar recording and presentation slides.

Nonmember Fee

\$1,060 per person

*Fee includes presentation slides.
Webinar recording not included.*

Cancellation/Refunds: Full refunds will be granted for cancellations received by MBA at least 5 days prior to the seminar date. After that date, an administrative fee of \$10 per canceled registration will be retained. Cancellations will not be accepted 2 days prior to the seminar. Substitutions are always permitted.



Missouri Bankers Association

207 E. Capitol Ave. ♦ Jefferson City, MO 65101
573-636-8151 ♦ www.mobankers.com



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Registration Request - HEALTH SAVINGS ACCOUNT: *Beyond the Basics | Webinar*

Please register the following individual(s) and location.

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NAMES OF ATTENDEES

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METHOD OF PAYMENT

Member Fee \$270 # _____ \$ _____
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