



An Introduction to Health Savings Accounts WEBINAR

January 7, 2027 or July 20, 2027 | 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

DATES & TIMES

Offered two separate dates. Choose the time that works best for you.

January 7, 2027

July 20, 2027

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 programs.



CANCELLATION POLICY

The Association understands that unforeseen circumstances may arise. The following cancellation policy has been established to ensure fairness and consistency for all participants.

Cancellation & Refund Schedule

- 30 days or more prior to the event:
Registrants will receive a 100% refund of the registration fee.
- 14-29 days prior to the event:
Registrants will receive a 50% refund of the registration fee.
- 7-13 days prior to the event:
Registrants will receive a 25% refund of the registration fee.
- Less than 7 days prior to the event:
No refunds will be issued.

Substitutions

If you are unable to attend, you may transfer your registration to another individual within your organization at any time prior to the event at no additional charge. Please notify the Association prior to the event date.

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

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.

NAMES OF ATTENDEES

Name _____

Title _____

Email _____

Choose webinar date: ☐ January 7 ☐ July 20

Name _____

Title _____

Email _____

Choose webinar date: ☐ January 7 ☐ July 20

Name _____

Title _____

Email _____

Choose webinar date: ☐ January 7 ☐ July 20

Name _____

Title _____

Email _____

Choose webinar date: ☐ January 7 ☐ July 20

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METHOD OF PAYMENT

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Total amount due..... \$ _____

☐ Check enclosed, payable to

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Print Name _____

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FOUR WAYS TO REGISTER

☎ 573-636-8151

🌐 mobankers.com

✉ mba@mobankers.com

✉ Mail check payable to Missouri Bankers Association and form to:
Missouri Bankers Association
P.O. Box 57
Jefferson City, MO 65102