ProtectPlus HSA Enrollees:

Thank you for choosing a ProtectPlus HSA high deductible healthcare plan. ProtectPlus HSA plans, when paired with a Health Savings Account offered through a bank, brokerage or other financial institution, provides security against catastrophic medical expenses, while allowing you to set aside and accumulate pre-tax dollars in a Health Savings Account (HSA) to pay for qualified medical expenses.

ProtectPlus HSA plans can be paired with a Health Savings Account offered through the financial institution of your choice. However, as a convenience, the Group Insurance Trust has made access to Health Savings Accounts through Bank of New York Mellon, US Bank and Alliant Credit Union available to ProtectPlus HSA subscribers.

If you would like to open a Health Savings Account with Bank of New York Mellon or US Bank please sign below to authorize the Group Insurance Trust to provide your account eligibility information to the HSA account provider you select. Once your eligibility is confirmed, the account provider will provide you with a welcome kit which includes basic information you will need to get started in making the most of your new Health Savings Account. The kit also includes a master signature card which must be completed and returned to the institution you select before you can make contributions or distributions from your account. A list of fees charged by Bank of New York Mellon, US Bank and Alliant Credit Union is included with this authorization.

If you choose to open an HSA account with Alliant Credit Union you may do so online at www.alliantcreditunion.org. You must first open an account with Alliant Credit Union (membership cost is $5, which you retain in your account) and then you may enroll in an HSA account. Existing Alliant Credit Union members can enroll in an HSA account immediately.
To the Group Insurance Trust:

My signature below authorizes the Group Insurance Trust to provide my eligibility information to (check one) [ ] Bank of New York Mellon  [ ] US Bank for purposes of opening a Health Savings Account. I understand that upon receiving confirmation of my eligibility, the account provider will provide me with a welcome kit that includes a master signature card which must be completed and returned to my chosen account provider before I can make contributions or distributions from my account.

__________ Please check here if you do not wish to open an account with either Bank of New York Mellon or US Bank.

Name ___________________________________________________________

Telephone Number ______________________________________________

Home Address:
______________________________________________________________
______________________________________________________________
______________________________________________________________
(No post office boxes please)

Signature _______________________________________________________

Date __________________________

Please return this form along with your enrollment forms to:

Banyan Administrators
Managers for the CalCPA ProtectPlus Programs
1215 Manor Drive, Suite 200
Mechanicsburg, PA 17055
Phone: (877) 480-7923
Fax: (877) 237-4519
CPAProtectPlus@fnrm.com