

# HSA Opportunities in the Marketplace

## Follow-up HSA Webinars:

HSA Basics  
January 18, 2012  
12:00 Noon

Advanced HSAs  
January 25, 2012  
12:00 Noon

Details next page

SOUTHEAST REGIONAL  
CENTER FOR FINANCIAL  
TRAINING, INC.

Lisa Phillips, Executive Director  
126 West Adams Street, Suite 501  
Jacksonville, FL 32210  
www.cft-flsc.org

Phone: 904-354-4830

Fax: 904-354-1834

E-Mail:

lisaphillipsaft@bellsouth.net

## HSA Opportunities in the Marketplace

A Complimentary Webinar Provided by  
Ascensus and Southeast Regional CFT  
Featuring Ascensus' Director of Sales,  
Kevin Boyles, CI, CISP

Ascensus has developed a complimentary  
***HSA Opportunities in the Marketplace  
Webinar***

January 11, 2012 - 12:00 PM (Eastern Time)  
This webinar is approximately 45 minutes  
followed by a live Q & A session.

### Topics Covered:

- What is an HSA?
- The HSA Marketplace - Where Has It Been, Where Is It Going?
- Identifying HSA Potential for Your Organization - Is now the Time?
- Potential Benefits of an HSA Program
- How Financial Organizations offer HSA Products
- Avoiding Common HSA Pitfalls
- Ascensus' HSA Solutions

To register for this complimentary webinar:

Please call

904-354-4830, e-mail

lisaphillipsaft@bellsouth.net, or send in  
(fax or e-mail) an enrollment form.



# HSA Optional Follow-Up Webinars

## HSA Basics – Compliance Webinar

Financial organizations just entering the health savings account (HSA) market may benefit most from this webinar, which provides an overview of HSAs. Topics include required documentation and reporting, contribution rules and limits, eligibility requirements, portability rules, and the difference between qualified and nonqualified HSA distributions.

**Audience**

Individuals responsible for HSA compliance and/or operations at the financial organization.

**Prerequisites**

None

**Length**

60 minutes followed by a 30-minute Q&A session

**Pricing**

Mix and match your webinar and CD purchases for a discount!

\$199: Single Webinar or Single CD

\$790: 5-Webinar/CD Package

\$1,580: 10-Webinar/CD Package

## Advanced HSAs – Compliance Webinar

HSAs continue to grow in popularity as more and more employers and individuals choose high deductible health plan coverage. This webinar includes the most current information on HSAs, including contribution limits, comparability rules for employer contributions, distribution rules and issues, and reporting requirements.

**Audience**

Individuals responsible for HSA compliance and/or operations at the financial organization.

**Prerequisites**

None

**Length**

60 minutes followed by a 30-minute Q&A session

**Pricing**

Mix and match your webinar and CD purchases for a discount!

\$199: Single Webinar or Single CD

\$790: 5-Webinar/CD Package

\$1,580: 10-Webinar/CD Package

To register for either of these webinars:  
Please call 904-354-4830,  
e-mail [lisaphillipsaft@bellsouth.net](mailto:lisaphillipsaft@bellsouth.net), or  
send in (fax or e-mail) an enrollment form.



# Southeast Regional Center for Financial Training, Inc. Course Enrollment Form Fax to (904) 354-1834

*Photocopy this page or print it from the "Forms and Info" page at [www.cft-flsc.org](http://www.cft-flsc.org)*

Please print all information clearly.

First Name \_\_\_\_\_ MI \_\_\_\_\_ Last Name \_\_\_\_\_

Title \_\_\_\_\_ Company \_\_\_\_\_

Work Street Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Office Phone Number \_\_\_\_\_ Office Fax Number \_\_\_\_\_

E-Mail Address \_\_\_\_\_ SS# (last 4 digits) \_\_\_\_\_

Your Educational Goal: Please indicate which AIB Diploma or Certificate you are pursuing. \_\_\_\_\_  
 Course Information: Please refer to the course schedule for the information needed to complete this portion of the enrollment form. Course type categories to use on the form below are: In-Person (IP), Instructor-Led Online (ILO), Self-Paced Online/ABA eLearning (SPO), or Assisted Self-Study (SS).

Course Title	Course # (when applicable)	Start Date (when applicable)	Course Type	Amount*
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____
4. _____	_____	_____	_____	_____

\*Appropriate fees will be added. (i.e. tax, administration, shipping and handling, etc.)

"I hereby agree to abide by my bank's stated policy on educational benefits and should I not complete this course in the manner prescribed, I will reimburse my employer or CFT accordingly. I hereby authorize the release of my grades to CFT and my employer."

Student's Signature \_\_\_\_\_ Date \_\_\_\_\_

Bill My Bank     Check Enclosed (payable to Southeast Regional CFT)     Send Invoice to pay by Credit Card

"As the approving individual of this student, I authorize payment for this enrollment from my financial institution to CFT, and I understand I may be responsible for processing the invoice generated by CFT for this student."

Approver's Name \_\_\_\_\_ Date \_\_\_\_\_

Approver's Signature \_\_\_\_\_ E-Mail \_\_\_\_\_

Approver's Address \_\_\_\_\_ Phone Number \_\_\_\_\_

Approver's Cost Center \_\_\_\_\_ Send Invoice to \_\_\_\_\_ E-Mail \_\_\_\_\_

### Policies and Procedures

All enrollment, extension, drop, withdrawal, and other standard policies and fees apply to this enrollment. See the Policies and Procedures section of our schedule for these details and more. Please visit the website, call the CFT Office, or e-mail your request for course descriptions, diploma and certificate worksheets, to drop or withdrawal, or if you have other questions.



126 West Adams Street, Suite 501 • Jacksonville, FL 32202  
 Phone: (904) 354-4830 Fax: (904) 354-1834 • [www.cft-flsc.org](http://www.cft-flsc.org)  
 E-mail: [lisaphillips@cft@bellsouth.net](mailto:lisaphillips@cft@bellsouth.net)