benefit strategies LLC

FY2019 Open Enrollment

TOWN OF NEEDHAM, MA

FLEXIBLE BENEFIT PLAN ENROLLMENT FORM

DEADLINE: May 11, 2018 at Noon - Enrollment Form to your HR Department

A. Employee Information *Please Print Clearly!*

Name: _____ Social Security Number (Required): _____

Home Address:

Check if New: ☐ _____

City: _____ State: _____ Zip Code: _____ Day Phone: _____

E-mail Address: _____ Date of Birth: _____

B. Flexible Benefit Plan Pre-tax Elections

1. Health Care Reimbursement Account Eligible health expenses include professional medical expenses incurred by my dependents or myself during the Plan Year for "the diagnosis, cure mitigation, treatment or prevention of disease, or for the purpose of affecting any structure or function of the body".

$	X		=	$
Your Contribution Per Pay Period		# of Pay Periods		Total Election

Maximum Election allowed $2650.00

2. Dependent Care Assistance Account Eligible dependent day care expenses are incurred to allow you and your spouse (if applicable) to be gainfully employed. Please remember that the IRS will require you to disclose the Tax ID or Social Security Number of your day care provider(s) when you file your income taxes.

$	X		=	$
Your Contribution Per Pay Period		# of Pay Periods		Total Election

Maximum Election allowed $5000.00

C. *FlexExpress*© Debit Card

The FlexExpress Cards© are optional. If you and/or your dependents have debit cards, they will automatically be reactivated unless you indicate below that you do not want cards. Otherwise, please indicate your selection below.

Check One:		**** If you and/or your dependents have debit cards, they will be automatically reactivated for your renewal. Otherwise, please select from below:***	NO action required.
	☐	I am a new participant to this plan and would like a NEW set of debit cards.	This is for brand new participants only; You will receive 2 cards. If you already have cards, selecting this option will automatically inactivate your existing cards.
	☐	I have cards that were lost, stolen or damaged and would like a replacement set of cards.	Selecting this option will inactivate and replace all of your existing cards. Replacement cards are $0 per set.
	☐	I do NOT want FlexExpress Cards.	Your default reimbursement method will be check unless the direct deposit information below is completed.

Additional Card Information: Please indicate the number of *additional* cards you would like to request below (If you request a card for yourself you will get 2 to start). Please note that cards are ordered in multiples of 2. (Example: 2, 4, 6, 8, etc.) Additional sets are $0 per set.

Number of Additional Sets Requested:

D. Direct Deposit Authorization

If you would like non debit card reimbursements to be direct deposited to your bank account (rather than receiving paper checks) fill out the information below EACH PLAN YEAR AND attach a voided check. If you do not complete this information each plan year you will be defaulted to check.

Bank Name: (See #1 on sample)

☐ Checking Account

☐ Savings Account

Routing Number - 9 digits (See #2 on sample):

Account Number (See #3 on sample): _____

SAMPLE

E. Signatures

By signing below, I agree to the following terms and conditions:

- I cannot change this election during the Plan Year unless I have a qualifying change in family status.
- I must make all of my elections carefully and conservatively. Expenses from Flexible Spending Accounts *cannot* be reimbursed from any other source and *must* be incurred during the Plan Year. Any money unclaimed from my Flexible spending account(s) at the end of the Plan Year will be forfeited to my employer after a run-out period. I will not receive it back.
- For expenses paid or reimbursed through this account I certify I have not been reimbursed and will not seek reimbursement under any other plan covering health benefits.
- The IRS requires me to keep documentation of all my expenses claimed and supply them to Benefit Strategies if requested.
- I have read and understood all of the plan details outlined in my Summary Plan Description.

Employee Signature (required):		**Date:**	
Payroll Frequency:	☐Semi-Monthly (24) ☐Weekly (52) ☐Weekly (38) ☐Weekly (42)		
Union Representation:	☐Non-Rep (Town) ☐ITWA ☐Police ☐Fire ☐BCTIA ☐NIPEA ☐Non-Rep (School) ☐NEA		
Employer Acceptance (required):		**Benefit Effective Date:**	
***If this is a mid-year enrollment, please list the first payroll date for deductions.**		**First Payroll Date:**	