



##37PNC#####

# Distribution of Excess Contribution

Must be filled out by Account Holder

The IRS specifies the total annual contribution limits which can be made each year. You can find those limits online at [www.IRS.gov](http://www.IRS.gov). If you have exceeded the contribution limit, please complete this form to request the over contributed funds be returned to you via ACH transfer or check. You may wish to review IRS Publication 969 found at [www.irs.gov/pub/irs-pdf/p969.pdf](http://www.irs.gov/pub/irs-pdf/p969.pdf).



**Fax completed form to:**  
855.588.1028



**Mail completed form to:**  
WealthCare Saver  
P.O. Box 162177  
Altamonte Springs, FL 32716



**Questions about this form?**  
Contact the number on the  
back of your debit card

## Section 1: Account Holder Information

ACCOUNT NUMBER (12 digits beginning with 601)

LAST NAME

FIRST NAME

MIDDLE INITIAL

SOCIAL SECURITY NUMBER

EMAIL ADDRESS

TELEPHONE NUMBER

STREET ADDRESS

CITY

STATE

ZIP CODE

## Section 2: Excess Contribution Information

Complete this section with the amount of excess being removed and earnings on that excess.

Please note: Excess contributions are reported via tax form 5498-SA in the year the contribution is made, and removals are reported via tax form 1099-SA in the year the removal is made.

\$ \_\_\_\_\_  
EXCESS AMOUNT (TC 155)

\$ \_\_\_\_\_  
EARNINGS ON EXCESS (TC 156)\*

\*IRS rules require distribution of excess HSA contributions to be accompanied by earnings on the excess contributions. IRS resources include IRS Notice 2004-50, Q&A 34. Please note we will not attempt to recalculate the earnings for accuracy.

