

City of Waterbury
FLEXIBLE BENEFIT PLAN ENROLLMENT FORM

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 (Required): _____ Date of Birth: _____

B. Flexible Benefit Plan Pre-tax Elections

1. Health Care Reimbursement Account Eligible expenses include professional dental and vision 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	Election Allowed \$100 Minimum / \$2,750 Maximum

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 \$100 Minimum / \$10,500 (\$5,250 if married filing separately)

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. Annual Fees: Paid by Employee, Cost \$5.00 per set.

	* 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.
Check One:	<input type="checkbox"/> 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 <u>inactivate</u> your existing cards.
	<input type="checkbox"/> I have cards that were lost, stolen or damaged and would like a replacement set of cards.	Selecting this option will <u>inactivate and replace all</u> of your existing cards. Replacement fee is \$5.00 per set.
	<input type="checkbox"/> 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 \$5.00 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) _____ Routing Number - 9 digits (See #2 on sample): <table border="1" style="width:100%; height: 20px; border-collapse: collapse;"> <tr> <td style="width:12.5%;"></td><td style="width:12.5%;"></td><td style="width:12.5%;"></td><td style="width:12.5%;"></td><td style="width:12.5%;"></td><td style="width:12.5%;"></td><td style="width:12.5%;"></td><td style="width:12.5%;"></td><td style="width:12.5%;"></td><td style="width:12.5%;"></td> </tr> </table>											<input type="checkbox"/> Checking Account <input type="checkbox"/> Savings Account	<table border="1" style="width:100%; border-collapse: collapse;"> <tr> <th align="center" colspan="2">SAMPLE</th> </tr> <tr> <td style="font-size: small;">Account Holder's Name Address, Etc.</td> <td style="font-size: small;">Check Number Transit Code ex: 23-94/1002</td> </tr> <tr> <td colspan="2" style="text-align: right; font-size: small;">DOLLARS</td> </tr> <tr> <td style="font-size: small;">1 Bank Information Name of Bank Address, Phone</td> <td style="font-size: small;">2 9 Digit Routing Number</td> </tr> <tr> <td style="font-size: small;">3</td> <td style="font-size: small;">Checking Account Number IF</td> </tr> </table>	SAMPLE		Account Holder's Name Address, Etc.	Check Number Transit Code ex: 23-94/1002	DOLLARS		1 Bank Information Name of Bank Address, Phone	2 9 Digit Routing Number	3	Checking Account Number IF
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Account Number (See #3 on 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 Reimbursement Accounts *cannot* be reimbursed from any other source and *must* be incurred during the Plan Year.
- I understand that my employer may allow me to carryover unused funds up to plan limits at the end of the plan year for deposit into the next following plan year for future use. Any money unclaimed from my Health Care Reimbursement Account(s) at the end of the Plan Year in excess of the carryover limits will be forfeited to my employer after a run-out period. I will not receive it back.
- For expenses 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: _____	
Employer Acceptance (required): _____	Effective Date: _____	
*If this is a mid-year enrollment, please list the first payroll date for deductions.		First Payroll Date: _____