



## Request for a Health Savings Account (HSA)

Blue Cross and Blue Shield of Illinois (BCBSIL) recommends that you consider establishing a Health Savings Account (HSA) to maximize the benefits of your BlueEdge<sup>SM</sup> HSA health plan. While you may open an HSA with any institution of your choice, we have arranged for you to be able to establish your BlueEdge health plan and initiate the process of opening an HSA with Mellon Financial (Mellon)\* all in one easy step.

Please complete this form to let us know if you intend to open a Mellon Health Savings Account (HSA) by providing the authorization as noted below. BCBSIL will notify Mellon once your BlueEdge health plan is activated to let them know to initiate the process of opening an HSA for you.\* Mellon will then send you a Welcome Kit which includes information about the HSA and account terms and conditions, and a signature card that you will need to sign and return to Mellon.

*Please send this completed form along with your application for one of the BlueEdge health plans to BCBSIL in the enclosed envelope or give to your agent (if applicable). (Note: this form is not required as part of your application for a BlueEdge HSA Health plan.)*

Yes, I would like to open a Mellon HSA. Please have Mellon send me an HSA Welcome Kit and initiate the process of opening an HSA for me!\*\*

I authorize BCBSIL to provide Mellon with information required to establish my HSA, including my name, address and Social Security number once my BlueEdge health plan is activated.

I understand that:

- The information described above is required by Mellon to establish an HSA and is considered Protected Health Information (PHI) pursuant to the Health Insurance Portability and Accountability Act of 1996 (HIPAA).
- In the event that a BlueEdge health plan is not activated in my name, BCBSIL will not provide Mellon with this information and this authorization will expire.
- This authorization is voluntary.
- Payment, enrollment or eligibility for my health care coverage will not be affected if I do not sign this form or open an HSA.
- I may revoke this authorization at any time before a Mellon HSA is established for me by notifying BCBSIL in writing at P.O. Box 2038, Aurora, IL 60507-2038. If I do revoke this authorization, it will not have any effect on any information received or actions BCBSIL or Mellon took before they received the revocation.
- Information disclosed as a result of this authorization may no longer be protected by federal privacy laws and may be disclosed by the company or individual receiving the information.
- Health Savings Accounts (HSA) have tax and legal ramifications. BCBSIL, does not provide legal or tax advice, and nothing herein should be construed as legal or tax advice. These materials, and any tax-related statements in them, are not intended or written to be used, and cannot be used or relied on, for the purpose of avoiding tax penalties. Tax-related statements, if any, may have been written in connection with the promotion or marketing of the transaction(s) or matter(s) addressed by these materials. You should seek advice based on your particular circumstances from an independent tax advisor regarding the tax consequences of specific health insurance plans or products.
- I should retain a copy of this authorization.

I plan on establishing an HSA with another institution ( \_\_\_\_\_ ).  
institution name

I do not plan on establishing an HSA at this time.

\_\_\_\_\_  
(printed name of individual applying for health plan)

\_\_\_\_\_  
(signature of individual applying for health plan)

\_\_\_\_\_  
date (month/day/year)

(over)

\* Please note: A Mellon Welcome Kit will be sent once your BlueEdge HSA health plan is activated. If this health plan is not approved and activated by BCBSIL, you will not receive an HSA Welcome Kit.

\*\* The choice of an institution that offers HSAs is solely your choice and BCBSIL will not interfere with your relationship with the institution you choose. BCBSIL does not itself undertake to provide financial services, but solely to arrange for the provision of health care services and to make payments to providers for Covered Services received by you under your health plan. BCBSIL is not in any event liable for any act or omission of the institution providing your HSA or the agent or employee of such institution, including, but not limited to, the failure or refusal to render services to you.

BCBSIL is not affiliated with or related to Mellon Financial Corporation or Mellon Human Resources & Investor Solutions ("Mellon"). The relationship between BCBSIL and Mellon is that of independent contractors and Mellon has no responsibility for the BlueEdge health plan or other insurance benefits provided by BCBSIL.

A Division of Health Care Service Corporation, a Mutual Legal Reserve Company, an Independent Licensee of the Blue Cross and Blue Shield Association

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**CONSUMER MARKETS**

<sup>SM</sup> Service Mark of Health Care Service Corporation