

HSA Enrollment Website

<https://go.lmcu.org/hsa-maxadvantage>

- Website provides link for enrollment or appointment scheduling if wanted to go into a branch
- Information on LMCU's HSA program
- Link to IRS Publication 502 for list of all qualified medical expenses



LMCU HSA ONLINE ENROLLMENT



HSA Enrollment

Questions? ☎ (800) 242-9790

Employer

Your Information

First Deposit

Review & Submit

Getting started

Please provide your employer's HSA identification number in the field below.

EMPLOYER INFORMATION

Health Savings ID*

1018 (Enter 4 digit GRCC Employer ID)

Next →



Employer

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Review & Submit

Tell us about yourself

Please fill out all fields below with your information.

Tell us about yourself-complete information

YOUR INFORMATION

Personal Info

First Name*

Last Name*

Gender* Male Female

Social Security Number*

Birthdate*

Mothers Maiden Name*

Residence Address

Address Line 1*

Address Line 2

City*

State*

Zip Code*

Select if mailing address is different from residence address

Contact Information

Email Address*

Confirm Email*

Primary Phone*

SecondaryPhone



“Tell Us About Yourself” continued complete information

Identity Verification*

ID Number*

Expiration Date*

Health Insurance Coverage

Coverage Level* Single HSA Family HSA

Additional Information

Citizenship* US citizen/resident alien Not a US citizen/resident alien

Important Info About Opening a New Account

Federal regulations require all financial institutions to obtain, verify and record information that identifies each person who opens an account, such as name, address, date of birth and other information. We may ask to see other identifying documents.

Everything I have stated in this application is true and complete. By checking this box I am providing 'written instructions' to LMCU under the Fair Credit Reporting Act authorizing LMCU to obtain information from my personal credit profile or other information from Experian. I am authorizing LMCU to obtain such information to verify my identity and to obtain my credit profile.*

Terms and Conditions

Please read the following important disclosure and membership requirements before applying for LMCU membership. By completing and submitting your request, you consent to having all disclosures provided or made available to you in electronic form and to doing business with LMCU electronically.

Please retain a copy of the following disclosures for your records:

- [Membership Agreement, Privacy Policy & Fee Schedule](#)
- [Consent to Receive Electronic Documents](#)

To read the PDF files, you may need to download the free Adobe Acrobat Reader.

PLEASE NOTE: By clicking the checkbox below, you verify that you have read, and understand the above disclosures and field of membership requirements, AND that you meet these requirements, AND that you are 18 years of age or older. In addition, you and your co-applicant, if any, authorize us to verify the information submitted and to obtain credit reports concerning all applicants identified in your application. You warrant to us that the information you are receiving is true and correct. Submitting this application constitutes your signature and authority to proceed with this electronic application.

I agree to the terms*

eStatement Enrollment

By default, you will receive a monthly statement for your account via regular mail.

I would like to enroll in eStatements

Additional Options

Your HSA comes with a VISA debit card but you may also request one complimentary book of checks.

Yes, I would like checks



Your Information

First Deposit

Review & Submit

This is for the membership **savings** account funding
\$5 deposit allows individual to have membership in LMCU

Funding your account

You may choose to fund your LMCU membership with either debit/credit card or a check. If your employer will be funding your membership you may choose to skip this step or make an additional deposit.

1

Fund with credit/debit card

2

Fund with check

← Previous

Next →



Review and submit.
Employer ID and company name
will populate - employee should
review all info for accuracy

Review and submit

Please review the information entered below to finish your account set up.

SUMMARY

Employer Information

Employer HSA ID: 1018

Employer Group Name: Grand Rapids Community College

Your Information

Name: Jason Smith

Gender: Male

SSN: 584-98-7574

Birthdate: 02/02/1984

Mother's Maiden Name: Brown

Residence Address: 123 Glenwood Hills , Grand Rapids MI 49512

Email Address: ira@lmcu.org

Primary Phone: (616) 243-5848

Type of Identification: Drivers License

ID Number: S845 542 595 786

Expiration Date: 2/2/2020

State Issued: MI

Health Insurance Coverage: Single HSA

Citizenship: US citizen

eStatements

Statement Selection: eStatements

Additional Options

Checks Requested: Yes

Deposit Information

Funded by: Check



HSA Enrollment

Questions?

☎ (800) 242-9790

Thank you for choosing Lake Michigan Credit Union!

Your Health Savings Account enrollment is almost complete.

You'll receive an email containing your account information and a few official forms you'll need to sign electronically, within 1-2 business days. Once these forms are eSigned, you'll receive a Visa HSA debit card via mail within 7-10 business days. Contact us with questions at (616) 234-6335 or (800) 242-9790 ext. 6335.

E-signature Email

From: LMCU <notifications@assuresign.com>

Sent: Friday, April 12, 2019 3:11 PM

To:

Subject: COMMERCIAL:A series of documents from Lake Michigan Credit Union are available for you to sign

Dear {Member Name},

You have been invited by Lake Michigan Credit Union to sign or provide input on an AssureSign document. Before we may provide documents in an electronic format to you, we must first obtain your consent.

If you prefer to use paper signatures or if you are unable to open and sign the electronic documents, please contact the LMCU employee that you are working with. You have the right to receive a paper copy of the disclosures, notices, terms and conditions. There is no cost to receive paper copies of any electronic records.

If you wish to use the electronic signing process, please click "Begin Signing" below. You will have the option to print any electronically signed documents within AssureSign.

If you are experiencing difficulty using AssureSign, please contact the LMCU employee you are working with or call one of the following numbers:

- Membership: 800-242-9790 x9969 or members@lmcu.org
- Lending: 800-242-9790 x9935
- Wires: 800-242-9790 x9950 or wires@lmcu.org

Please click "Begin Signing" to begin this process.

[Begin Signing](#)

Document signing powered by **AssureSign**.

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Email providing e-sign documents (sent within 24 hours of submitting enrollment form)

Employee **MUST** sign to fully complete enrollment

*Employee not able to reply directly to email

Welcome Letter Email

Thank you for opening a Health Savings Account (HSA) with LMCU. We appreciate your business!

We've opened the following account(s) for you:

Account Number: 123456
Member Savings MICR: 100001234567
HSA MICR: 109001234567
Routing Number: 272480678

Please use the HSA MICR and routing numbers above for direct deposit purposes.

A Visa HSA debit card(s) for use with your HSA account will arrive by mail in the next two weeks. Please **verify your account balance prior to using your Visa HSA debit card(s)** to ensure contributions have been deposited and are available in your account.

If you would like to order your first box of HSA checks (120 checks) at no charge, please contact LMCU at 800-242-9790.

You can get account information anytime using LMCU's online banking. Here's how to enroll in online banking.

First-time users must create a username and password.

- Go to www.LMCU.org
- Click "Sign Up" under the Online Banking Login and choose "Personal Banking"
- Continue the registration process by clicking where prompted and verifying your account information
- Create a username and password
- You will need to establish three security questions that will be used to verify your identity in the future



Want to know more?

Call us at (616) 234-6335 or (800) 242-9790 ext.9910, visit any branch location, or go to LMCU.org

To complete the registration, select a personal image and phrase that will be displayed on the LMCU online banking login page.

Attached you will find an HSA beneficiary designation form, as well as an HSA power of attorney form.

The HSA beneficiary designation form has been provided to you, so that you may leave the account to someone in the event of your death. The individual listed as beneficiary would inherit those HSA funds.

The HSA power of attorney form is available to you if you would like to add someone to your HSA that would need full access to the account. The power of attorney would have full access to the HSA, and could receive a debit card in their own name.

If you need further assistance, or have questions, please give one of our HSA experts a call at **(616) 234-6335**.

Thank you for your business!



Federally Insured by NCUA

Welcome Letter email providing the following (sent within 4 days of enrollment to give time for e-Sign doc completion)

- Account numbers
- Information on online banking enrollment
- HSA Beneficiary form
- HSA Power of Attorney form - if they want to allow someone else to have a HSA debit card
- Employee is able to directly reply to email if questions - email goes directly to the IRA/HSA department who handle all HSA accounts

Questions?

Contact Lake Michigan Credit Union:
(800) 242-9790 or (616) 234-6335