

HSA Procedures Manual

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*An HSA
Administration &
Compliance Guide*

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CWF's HSA Procedures Manual is updated with the most recent rules to help you operate in compliance. This easy-to-use manual focuses on the laws and regulations that a financial institution, serving as an HSA custodian or trustee, must perform. The IRS penalties for not performing required tasks can be very expensive. This manual offers comprehensive guidance. With respect to each task the HSA custodian or trustee is required to perform, the manual sets forth recommended procedures along with an explanation why such procedures are recommended.

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