

Flexible Spending Account Enrollment Form

Effective Date: _____

Please complete all sections of the enrollment form and sign.



Section 1: Employee Information			
Last Name:	First Name:	Middle Initial:	Social Security Number:
Date of Birth:	Gender: <input type="checkbox"/> Female <input type="checkbox"/> Male	Marital Status: <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced	Email Address:
Street (Include Apartment Number)			
City:	State:	ZIP Code (+4 if available):	Phone Number:



Section 2: Elections

Complete this section based on the offerings by your Employer. Not all options are available. Please see your Employer if you have questions about what is available.

<input type="checkbox"/> Health FSA (\$2,750 Maximum Annual Election)	
<input type="checkbox"/> I ELECT to participate	Protect \$ _____ annually from taxes
<input type="checkbox"/> I DO NOT ELECT to participate	Use the worksheet to determine the amount necessary to cover your annual expenses
<input type="checkbox"/> Dependent Care FSA (\$5,000 Maximum Annual Election; \$2,500 if married and filing separately)	
<input type="checkbox"/> I ELECT to participate	Protect \$ _____ annually from taxes
<input type="checkbox"/> I DO NOT ELECT to participate	Use the worksheet to determine the amount necessary to cover your annual expenses
<input type="checkbox"/> Transit (\$270 Maximum per Month)	
<input type="checkbox"/> I ELECT to participate	Protect \$ _____ monthly from taxes
<input type="checkbox"/> I DO NOT ELECT to participate	
<input type="checkbox"/> Parking (\$270 Maximum per Month)	
<input type="checkbox"/> I ELECT to participate	Protect \$ _____ monthly from taxes
<input type="checkbox"/> I DO NOT ELECT to participate	

Section 3: Authorization

I understand that by signing and submitting this form, I authorize the adjustment of my annual taxable salary based on my elections above, with the "tax protected" funds being transferred into my Flexible Spending Account. My election cannot be changed during the plan year, unless I experience an eligible change in status. I further understand that this form must be signed and dated prior to my plan effective date to be eligible to participate in this plan year. At the end of the plan year or date of my termination I will have a specified timeframe as defined by my employer to submit receipts for reimbursement for services received during the plan year or employment period.

I understand that any eligible costs that may be reimbursed directly to me by other plans are **not eligible** for reimbursement through the Flexible Spending Account.

Employee Name (printed): _____ Signature: _____

Section 4: Employer Section		
Company Name:	Effective Date:	Plan Year From: