



Please use this checklist to ensure that all forms and information needed to process your group application are included in the submission packet to Sterling HSA.

Sterling HSA Group Enrollment Materials Checklist

- Sterling HSA Employer Group Application
- Sterling HSA Individual Application(s)
- Sterling HSA Beneficiary Designation Form for each applicant
- List Bill Document for this transaction
- Attach check for first month deposit to initiate accounts

To calculate total check:

- Minimum \$100 initial contribution required per HSA account established
- \$35 one-time only account set-up fee (per employee)

- Two months of maintenance fees
(Based on account type. Standard: \$8.75/month. Value: \$2.50/month)

Mail all documents to:

**Claremont Insurance Services
2999 Oak Road Suite 810
Walnut Creek, CA 94597**

*Please note that a **Sterling HSA Custodial Agreement and Administrative Agreement** must be given to each HSA-accountholder at time of account opening. The **Custodial Agreement** is not submitted to Sterling HSA or Claremont Insurance. It is to be kept on file by each individual accountholder.*