



Instructor: Matt C.

HSA FUNDAMENTALS

Course #: S5013LV—2020 UPDATE

Capitol Plaza, 100 State Street, Montpelier, Vermont

Thursday, March 12, 2020

8:30AM—1:00PM

course description

This half-day program will provide initial instruction on the essential concepts and information related to the establishment and administration of Health Savings Accounts.

Objectives for this program will include an Introduction, Establishment, Funding, Distributions and the Portability of the Health Savings Account.

If you would like to become more comfortable with HSA rules, responsible for ensuring a compliant HSA department or engaged in the administration of the HSA offering at your financial institution, then you should consider this program.

Looking for more details? [Visit our website](#) for a detailed course description.

how to enroll

Enroll online at our website, CFTEA.org under Professional Skills and Special Topics.

how class works

Course session runs live with an experience HSA specialist and classroom interaction.

tuition

\$295 per participant for all 2020 materials and workbook.

withdrawal policy

CFTEA withdrawal policy is outlined within our latest catalog and on our website. Before class begins the enrollment may be transferred to another student with the approval of the student's employer and the CFTEA office.

**Would you like to know more about
new educational career paths?**

Visit us at cftea.org and
follow us on Facebook!

SPRING 2020 Registration and Offerings

Select courses to register

January 2020

- 40 Steps to Make Safe Deposit Boxes a Profit Center Webcourse 1/29/2020 (Special pricing discount)
- Commercial Lending Webcourse starts 1/30/2020

February 2020

- IRA Fundamentals—Machias, Maine 2/5/2020
- Medallion Signature Guarantee—Montpelier, Vermont 2/5/2020
- Notary Public Workshop—Montpelier, Vermont 2/5/2020
- Top 50 Important Safe Deposit Box Operating Procedures Webcourse –2/13/2020

March 2020

- Quality Service Webcourse starts 3/4/2020
- Money and Banking—Morrisville, Vermont starts 3/5/2020
- IRA Fundamentals—Montpelier, Vermont 3/10/2020
- IRA Advanced—Montpelier, Vermont 3/11/2020
- IRA Fundamentals—Augusta, Maine 3/11/2020
- IRA Fundamentals—Rutland, Vermont 3/11/2020
- HSA Fundamentals—Montpelier, Vermont 3/12/2020
- Top 25 Safe Deposit Compliance Issues Webcourse 3/17/2020
- Written Communication Webcourse starting 3/17/2020
- IRA Fundamentals—Rockport, Maine starting 3/18/2020
- Modern Supervisor—New Gloucester, Maine starting 3/24/2020
- IRA Fundamentals—New Gloucester, Maine 3/31/2020

April 2020

- Consumer Lending Webcourse starts 4/1/2020
- IRA Advanced—New Gloucester, Maine 4/1/2020

April 2020

- HSA Fundamentals—New Gloucester, Maine 4/2/2020
- Legal Foundations in Banking Webcourse starting 4/2/2020
- Modern Supervisor—Gilford, New Hampshire starts 4/9/2020
- Enhance Your Potential, Build Your Leadership Narrative Certificate—New Gloucester, Maine starts 4/16/2020
- 30 Steps to Audit a Safe Deposit Department Webcourse 4/22/2020
- Communicate with Confidence, Comfort and Conviction—New Gloucester, Maine 4/22/2020

May 2020

- Branch Manager Bootcamp—New Gloucester, Maine starts 5/6/2020
- Structuring Commercial Loan Packages—New Gloucester, Maine 5/20/2020

REGISTRATION - Scan to tammy@cftea.org

Name: _____

Organization: _____

Month of Birth: _____ Day of Birth: _____

Email: _____

Contact Phone: _____

Register for courses selected above or another course and code:

Approval Signature:
