



# HEALTH SAVINGS ACCOUNT

HSA (FOR QUALIFIED MEDICAL EXPENSES) FEE SCHEDULE



**Membership \$75**

*Due upon account opening and annually thereafter.*



**Visa Debit Card \$0**

## Transaction Processing

Each funds transfer between IRA and HSA \$25

## Banking

IRA Withdrawal via Check \$15

Wire In/Out \$25/\$35

Void/Stop Payment \$35

## Miscellaneous

FedEx Overnight \$75

Roth Conversion \$100

## Always Included

Form 5498-SA/1099R-SA Filing \$0

Allowable Expense Analysis \$0

Live Webinars & Education \$0

**Effective 4/01/2024**, please note that each account must maintain a minimum \$500 cash balance. Should the cash balance fall below the minimum required, a \$100 low balance penalty will be charged at the time of renewal. Fees are automatically deducted from the account, and members may opt to charge fees to a credit or debit card.

Additional miscellaneous fees include but are not limited to a 3.5% fee for contributions via credit card, incomplete or late Fair Market Valuation form (\$175), international wires (\$90), buy/sell/transfer offshore real estate (\$495.00), offshore real estate holding fees (\$395), and account termination (\$325). Depository storage fees for precious metals may apply. A copy of our current fee schedule is available on our website, [iraclub.com](http://iraclub.com). Fees are subject to change.