# Flexible Benefit Plan Enrollment Form

## City of Peabody

**Live Chat:** benstrat.com
**Phone:** 1-888-401-FLEX (3539)
**Fax:** 603-647-4668
**Email:** info@benstrat.com
**Address:** PO Box 3938, Manchester, NH 03105

### Employee Information:

**Employee Name:**
First/Last

**Employee SSN:**

**Home Address:**
(City, State, Zip Code)

☐ Check if New

**Date of Birth:**

**Email Address:**

**Day Phone:**

**E-mail is required to receive important account notifications.**

### Flexible Benefit Plan Pre-tax Elections:

**Health Care Reimbursement Account**: Eligible health expenses include professional medical expenses incurred by my dependents or myself during the Plan Year for "the diagnosis, cure mitigation, treatment or prevention of disease, or for the purpose of affecting any structure or function of the body".

**Maximum Election Allowed: $2,750**

Your Contribution Pay Period **X** Number of Pay Periods **=** **$** Total Election

**Dependent Care Assistance Account:** Eligible dependent day care expenses are incurred to allow you and your spouse (if applicable) to be gainfully employed. Please remember that the IRS will require you to disclose the Tax ID or Social Security Number of your day care provider(s) when you file your income taxes.

**Maximum Election Allowed: $5,000**
$2,500 if married and filing separately

Your Contribution Pay Period **X** Number of Pay Periods **=** **$** Total Election

### FlexExpress© Debit Card :

If you are a new enrollee a set of 2 FlexExpress Cards© will be mailed out to you automatically. If you and/or your dependents already have debit cards, they will automatically be reactivated. Otherwise, please indicate your selection below.

| Check One | *** If you and/or your dependents have debit cards, they will be automatically reactivated for your renewal. Otherwise, please select from below:** | **NO action required.** |
|---|---|---|
| | ☐ I have cards that were lost, stolen or damaged and would like a replacement set of cards. | Selecting this option will inactivate and replace all of your existing cards. Replacement cards are $5.00 per set. |

**Additional Card Information:** Please indicate the number of additional cards you would like to request below (If you request a card for yourself you will get 2 to start). Please note that cards are ordered in multiples of 2. (Example: 2, 4, 6, 8, etc.) Additional sets are $5 per set.

Number of Additional Sets Requested:

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benefit strategies LLC

## Direct Deposit Authorization :

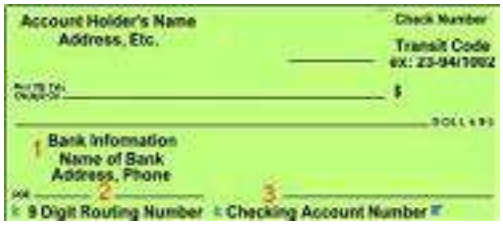
If you would like non debit card reimbursements to be direct deposited to your bank account (rather than receiving paper checks) fill out the information below EACH PLAN YEAR AND attach a voided check. If you do not complete this information each plan year you will be defaulted to check.

**Bank Name:**
(See #1 on sample)

**Account Type:** ☐ Checking ☐ Savings

**9 Digit Routing Number:**
(See #2 on sample)

**Account Number:**
(See #3 on sample)




## Signatures

By signing below, I agree to the following terms and conditions:

- I cannot change this election during the Plan Year unless I have a qualifying change in family status.
- I must make all of my elections carefully and conservatively. Expenses from Reimbursement Accounts cannot be reimbursed from any other source and must be incurred during the Plan Year. Any money unclaimed from my reimbursement account(s) at the end of the Plan Year will be forfeited to my employer after a run-out period. I will not receive it back.
- For expenses reimbursed through this account I certify I have not been reimbursed and will not seek reimbursement under any other plan covering health benefits.
- The IRS requires me to keep documentation of all my expenses claimed and supply them to Benefit Strategies if requested.
- I have read and understood all of the plan details outlined in my Summary Plan Description.

**Employee Signature:**
First/Last

**Date:**

**Employer Acceptance:**
First/Last

**Benefit Effective Date:**

If this is a mid-year enrollment, please list the first payroll date for deductions.

**First Payroll Date:**

Please Note: If you terminate employment throughout the plan year, you have 90 days from your last day of employment to submit claims for reimbursement for eligible expenses. Eligible expenses must be incurred while you were an active employee.

**Print and Sign →**