



Highland Falls-Ft. Montgomery CSD PG Blue - FSA Enrollment Form

Your Account Information Is Online
www.ThePreferredGroup.com

— Please Read, Complete & Return to Payroll Office by September 09, 2022

DIRECTIONS: Employee — Complete Sections 1, 2, 3 and 4 then return to your employer
 Employer — Complete 'Change Type' Box and complete Section 5

Section 1 Employee Information			
Employer Group #	Employer Group Name	Plan Year	Social Security Number
10099	Highland Falls-Ft. Montgomery CSD	10/1/2022 to 9/30/2023	_____ - ____ - _____
Employee Name (First Name)		(Last Name)	
Employee Address (Street, Apt. #)			Date of Birth (mm/dd/yyyy)
Employee Address (City, State, Zip Code)			____/____/____
Home Phone	Cell Phone	Email Address (Please allow email from benefitsinfo@thepreferredgroup.com)	
Section 2 Flexible Spending Plan Benefit Elections			

I am enrolled in the Highland Falls-Fort Montgomery Central School District's Medical Insurance Premium Plan, and elect to have my portion of premiums paid on a PRE-TAX basis, for this and subsequent years.

I am enrolled in the Highland Falls-Fort Montgomery Central School District's Medical Insurance Premium Plan, but do NOT elect to have my portion of premiums paid on a pre-tax basis, for this and subsequent years.

I elect NOT to participate in the Flexible Spending Accounts for this plan year.

Account Type	Fund#	New Election			
MEDICAL FSA (\$100 min/\$2,850 max)	1				
DEPENDENT DAY CARE (\$5,000 max/\$2,500 if married, filing separately)	2				

Section 3 Reimbursement Options	
If you wish to have your reimbursements directly deposited to your bank account, please fill in the line below.	
Direct Deposit Setup: Bank Name _____ Routing # _____ Acct # _____	

Please note: By entering the above information you are enrolling into these specified programs and are validating your dependent information. For more information on these options including the timing of reimbursements, please see your Summary Plan Description.

Section 4 Signature and Acceptance of Rules of Flexible Spending Plan Rules

Salary Redirection Agreement (Please read and sign below): I have read and understand the explanation I have received regarding my options under this Flexible Benefits Program. I hereby apply for the options listed above and I authorize my employer to redirect my salary during the plan year as indicated. I understand that I am only entitled to the amount of the above elections and cannot change any of my elections during the plan year (unless I have an acceptable change in status), and that any money left in my account(s) at the end of the plan year will be treated in accordance with my employer's FSA plan document.

Employee Signature	Date

Section 5 Employer's Section — Payroll Information for Salary Reduction Changes					# Payrolls
Fund	First Payroll Date	Last Payroll Date	YTD Deductions	Per Payroll Deduct	Use 'First Payroll Date' and employer signature ONLY if the employee is making a <i>mid-year</i> election. Use the 'Last Payroll Date' and 'YTD Deductions' if changing an <i>old</i> election or termination.
FSA					
DCA					
Employer Signature				Date	