

HSA & ICHRA CE Course Outline

Course Instructor: Todd Berkley

Thursday, November 11, 2021

12:00 p.m. – 12:30 p.m.

[30 Minutes]

“HSA's - What they are and where they are going”

Making the most of today's HSA

- 1.) The basics - current limits and qualifications
- 2.) Clarifying rules for putting money in
- 3.) Clarifying rules for taking money out
- 4.) Utilizing investment options for long term gain
- 5.) Considerations in to improve HSA legislation

12:30 p.m. – 1:00 p.m.

[30 Minutes]

“ICHRA Plans”

An emerging option to increase choice and lower costs

- 1.) How ICHRAS work
- 2.) Advantages for Employers
- 3.) Advantages for Employees
- 4.) Advantages for brokers
- 5.) Case Study example
- 6.) Opportunity to expand HSAs and other ancillary benefits

1:00 p.m. – 1:15 p.m.

[15 Minutes]

Open forum for questions and answers