

Retirement, Health & Education

Saving for a Brighter Future

If you are ready to empower your future – you need a plan. Your local banker can help you find one that fits your needs.



TRADITIONAL IRA

Saving with Retirement in Mind

- Save while you are employed and before you turn 70½¹
- See a possible tax deduction of contributions¹
- Feel safe with a FDIC insured account
- Pay taxes on distributions only at withdrawal



HEALTH SAVINGS ACCOUNT (HSA)²

Save for Healthcare Expenses

- Make tax-deductible contributions¹
- Use to cover every-day qualified medical expenses
- Receive funds via check or debit card



ROTH IRA

No Age Limit Retirement Account

An individual retirement account with no age limits that allows you to:

- Save at any age if you are earning employment income¹
- Contribute after tax dollars to your account
- Watch your retirement savings grow
- Make tax-free withdrawals, if qualified¹
- Feel safe with a FDIC insured account



COVERDELL EDUCATION SAVINGS ACCOUNT

Save for a Child's Education

An account that helps you save for education expenses with tax-free earnings.

- Receive contributions from almost anyone³
- Contribute money that grows tax-free if used for qualified education expenses
- Help pay qualified education expenses such as tuition, textbooks and room and board

MORE
INFO?

Visit any MetaBank Branch location for more details.

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¹ Consult your tax advisor for advice and information concerning your particular situation.

² To sign up for a MetaBank HSA, you must have a qualifying health plan with minimum annual deductibles, not be covered under another health plan, not be a dependent on another's tax return, be younger than 65, not have a Flexible Spending Account and not be enrolled in Medicare Part A or Part B.

³ Including parents, grandparents and family friends.