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**SUBMIT FORM**  
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# TEMPORARY DISABILITY INSURANCE (TDI) W-2 AGREEMENT

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## EFFECTIVE TAX YEAR

EFFECTIVE TAX YEAR OF REQUEST (APPLIES TO CURRENT AND FUTURE TAX YEARS): TAX YEAR ENDING DECEMBER 31, 20 \_\_\_\_\_

## EMPLOYER INFORMATION

GROUP NAME \_\_\_\_\_ GROUP NUMBER \_\_\_\_\_

CONTACT \_\_\_\_\_ TITLE \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_ PHONE NUMBER \_\_\_\_\_

Per IRS Regulations, Forms W-2 are filed to report Temporary Disability Insurance benefits paid to employees. Both taxable and nontaxable benefits are reported. The employee contributions made with after tax dollars will determine what portion of sick pay, if any, is excludable from employee's gross income. Employer is responsible for providing the information necessary to determine the taxable portion of sick pay. Employer can prepare the W-2's or elect US Able Life to prepare them. Please read the information below then select who will be responsible for W-2 reporting.

- This agreement is for Temporary Disability Insurance benefits only. It does not apply to long term disability.
- If you use an external payroll vendor, please contact the vendor prior to electing US Able Life to prepare W-2's. Most vendors require that they prepare the forms.
- US Able Life will withhold and deposit employee Social Security and Medicare taxes (FICA taxes) and federal income tax if requested by the employee. US Able Life will notify employer of the taxable benefits paid.
- Under no circumstance is US Able Life responsible for employer's portion of FICA taxes, FUTA taxes, any other payroll or employment related tax, fee, premium or the like, including state disability insurance, state or local occupational tax or any Worker's Compensation tax which may be applicable to sick pay.
- November 30th is the last date for changing the W-2 Option selected for the tax year. This agreement will continue until replaced by a new agreement, the policy terminates and/or sick pay payments are discontinued.

## OPTIONS (CHOOSE ONLY ONE)

OPTION 1

USABLE LIFE **DOES** PREPARE W-2 STATEMENTS REPORTING TDI BENEFITS FOR PAYEES.

Employer hereby designates US Able Life as its agent for the sole purpose of providing W-2 statements with sick pay information to payees by January 31st of each year, or such other date required by the IRS. US Able Life will use its name and EIN on each of these forms. If policy terminates, US Able Life will continue to provide W-2'S for sick pay payments on all claims incurred prior to termination of policy.

OPTION 2

OR USABLE LIFE **DOES NOT** PREPARE W-2 STATEMENTS REPORTING TDI BENEFITS FOR PAYEES.

If this option is chosen, US Able Life will provide employer, by January 15th of each year, with the information required by Federal law for employer to prepare W-2's for its employees and file Federal and State information returns.

## SIGNATURES

EMPLOYER SIGNATURE \_\_\_\_\_

TITLE \_\_\_\_\_

DATE \_\_\_\_\_

USABLE LIFE SIGNATURE \_\_\_\_\_

TITLE \_\_\_\_\_

DATE \_\_\_\_\_