VOUR HSATRANSFER It's easy to consolidate your accounts







Moving your HSA is simple:

1. Download the HealthEquity transfer form* at: www.HealthEquity.com/form

2. Complete the form entirely.

Since HSAs are individually held accounts, only you, the account owner, can request your account be closed and the balance be transferred.

3. Send the completed form to HealthEquity via mail, fax or email.

Address: HealthEquity, Attn: Client Services 15 W Scenic Pointe Dr. Suite 100 Draper, UT 84020

Fax: 520.844.7090 Email: dms-inbox1@healthequity.com

We'll take it from there.

HealthEquity will submit the form to your prior administrator to initiate the transfer of your balance to your HealthEquity HSA (less any applicable closing fees assessed by your prior administrator). The transferred amount will appear in your HealthEquity account within four to six weeks (processing timeframes and blackout periods vary by administrator).

Earn <u>double</u> interest

Transfer an existing HSA to HealthEquity and earn double interest. For details, visit www.HealthEquity.com/doubleit.

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Building Health Savings[®]

15 W. Scenic Pointe Drive, Ste. 100 Draper, UT 84020 T www.HealthEquity.com

Need help?

HealthEquity is available to help you with your transfer every hour of every day:

866.346.5800

*Most administrators will accept the HealthEquity form. Please contact your current administrator to confirm. ©2013-2014 HealthEquity All rights reserved. HSA_Transfer_June_2014 Nothing in this communication is intended as legal, tax, financial, medical or marital advice. Always consult a professional when making life changing decisions. It is the members' responsibility to ensure eligibility requirements as well as if they are eligible for the plan and expenses submitted.