

YOUR HSA TRANSFER

It's easy to consolidate your accounts

Need help?

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

866.346.5800

Save with an HSA

HealthEquity makes it easy for you to manage your health savings account (HSA) by providing convenient access online and through our mobile app. You can also save on potential administration fees from your prior custodian by consolidating your HSA with HealthEquity.

Moving your HSA is simple:

1. Download the HealthEquity transfer form¹ at:
[HealthEquity.com/form](https://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
15 W Scenic Pointe Drive, Ste 100
Draper, UT 84020

Email: transfer@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 custodian). The transferred amount will appear in your HealthEquity account within four to six weeks (processing timeframes and blackout periods vary by custodian).

Earn double interest

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

¹ Most administrators will accept the HealthEquity form. Please contact your current administrator to confirm.

Nothing in this communication is intended as legal, tax, financial or medical 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.

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