



**HEALTH SAVINGS ACCOUNT
TRANSFER REQUEST**

Account Holder Information (please print)			SelectAccount ID #							
Last Name _____ First Name _____ Middle Initial _____			S	A						
Street Address _____			Social Security # (if SA# is not known)							
City _____ State _____ Zip _____			Daytime Phone							
Email address _____										

Transfer Instructions

This transfer will be into an HSA.

Directly transfer: all or part of the account identified below to **SelectAccount** as Custodian of the _____ account.
(Account Holder's Name)

This transfer: will will not close the account.

Asset Liquidation Instructions

Description	Total Quantity	Quantity To Be Transferred	Liquidate Immediately	Liquidate at Maturity	Transfer In Kind
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Current Trustee/Custodian Info (transferring FROM)	Accepting Account Trustee or Custodian
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Trustee/Custodian's Name _____ Street Address _____ City _____ State _____ Zip _____ Trustee/Custodian's Phone# _____ Trustee/Custodian's Account ID# _____	SelectAccount agrees to serve as the new Custodian for the account of the above-named individual, and as Custodian, we agree to accept the assets being transferred. Account ID of Accepting HSA _____ <small>(SelectAccount ID #)</small> _____ Authorized Signature of SelectAccount Date
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Signature of HSA Account Owner

I authorize the transfer of the account assets in the manner described above and certify that all of the information provided by me is correct and may be relied upon by SelectAccount.

HSA Account Owner Signature Date

Questions? Call Member Services at (651) 662-5065 or 1-800-859-2144.

Send via secured email only:
 SelectAccount.documents
 @SelectAccount.com

Fax to:
 651-662-7247
 866-231-0214

Mail to:
 P.O. Box 64193
 St. Paul, MN 55164-0193