

Account Holder Information (please print)			Spending Account 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. An IRA rollover to a HSA is a one-time tax free distribution. The "roll-over" counts as a contribution and cannot exceed the HSA contribution limit for the tax year.

Directly transfer: all or part of the account identified below to **HealthEquity, Inc.** as Custodian of the _____
account for tax year _____. (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)

Trustee/Custodian's Name _____

Street Address _____

City _____ State _____ Zip _____

Trustee/Custodian's Phone# _____ Trustee/Custodian's Account ID# _____

Signature of HSA Account Holder

I understand I am limited to one IRA to HSA trustee rollover and certify I have not made another rollover.

_____ Date _____
HSA Account Holder Signature

Please note: some carriers or fund providers may require notarization or a medallion signature guarantee. To avoid any delays, please check with your IRA administrator to verify its requirement before submission and whether a signature guarantee is required. The Medallion Signature Guarantee may be executed by banks, broker dealers, credit unions, national securities exchanges and savings associations that participate in STAMP, SEMP or NYSE-MSP. A notary public is not a substitute for a Medallion Signature Guarantee.

Medallion Signature Guarantee Stamp and Signature _____

Account Holder Instructions: Please send this completed form back to your previous administrator for processing.

Administrative Check Mailing Instructions: Please mail the check to the address listed below:

PO Box 860684
Minneapolis, MN
55486-0684

Overnight:
Lockbox 860684
1200 Energy Park Dr
St Paul, MN 55108-0684