

HEALTH SAVINGS ACCOUNT (HSA) TRUSTEE-TO-TRUSTEE TRANSFER OUT FORM

First Name:	MI:	Last Name:					Social Se	ecurity Nu	mber:
Street Address Line 1:									
Address Line 2:		City:					State:	Z	iip:
Daytime Telephone Number:			Evening T	elepho	ne Numb	er:			
GENERAL INFORMATION									
This form is used when you want to move fun times this can occur. Fees may apply for acco			ts account	to a ne	w Custo	dian. Ther	e is no limi	it on the r	iumber of
TRANSFER INSTRUCTIONS FROM VIA BEN	NEFIT	-S							
Via Benefits HSA Account Number:									
☐ Transfer 100% of my account balance	and o	close my account.							
Make a partial transfer of \$ and keep my account open.									o be charged e the amount
Via Benefits will send funds to the new custoo	lian v	a check.		of the funds	transfer need to	red baland be liquid	ce. Any fur ated prior	nds inves to subm	ted in mutual ission of this
Please return the completed form to: Via Benefits P.O. Box 25101 Lehigh Valley, PA 18002-5101				custo form.	dians ma	y require	their own	form in a	dling. Some ddition to this dian for their
NEW CUSTODIAN INFORMATION									
New Custodian Name:					New HS	A Account	Number:		
Address:			City:					State:	Zip:
ACKNOWLEDGMENT AND SIGNATURE									
I have read and understand the transfer rules see a tax professional. All information pro responsibility for this funds transfer transact hereby irrevocably designate this distribution	vided ion a	by me is true and will not hold \	and correct /ia Benefits	and	may be	relied on	by Via E	Benefits.	I assume full
Signature of Account Owner:						Date:			

PLEASE KEEP A COPY FOR YOUR RECORDS

GENERAL INFORMATION

There are two ways to move funds from an existing HSA into a new HSA:

- Rollover: A Rollover is a cash distribution made payable to the account holder and may be redeposited with another custodian
 within 60 days. The account holder can either write a personal check or forward the cash distribution check to the new
 custodian. The account holder is limited to using this approach once every 12 months. Via Benefits provides HSA Rollover
 forms online.
- 2. Trustee-to-Trustee Transfer: In a trustee-to-trustee transfer the current custodian moves funds to the new custodian directly. There is no limit under the tax laws on the number of times this can occur.

Comparison of rollover and trustee-to-trustee transfer:

	Rollover	Trustee-To-Trustee Transfer			
Permitted Frequency	One rollover per 12 month time period, per HSA. The rollover redeposit must be completed within 60 days. If you fail to redeposit within this 60-day period, your distribution may be taxable to you.	Unlimited			
Tax Reporting	Via Benefits is required to report the rollover to the IRS.	None required			

NOTE: Acclaris, Inc. offers all account services and is the HSA custodian. Acclaris, Inc. does not provide tax or legal advice. This summary is provided solely for general information purposes, and is not to be construed as tax or legal advice. Please consult with your own attorney or tax advisor to understand the tax and legal consequences of your HSA and your particular situation.