Request for Transfer to a Health Savings Account (HSA)

	NAME AND A	ADDRESS			SOCIAL SECURITY NUMBER	
					DATE OF BIRTH	
DA	YTIME PHONE NUMBER			E-MAIL (0	OPTIONAL)	
				·		
YPE OF TRANS	FER					
Select One:						
☐ HSA to HSA	☐ Archer Medica	l Savings Account (MSA) to an HSA			
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My HSA/Archer MSA cus	<u> </u>				should transfer the assets identi	
in the Transfer Instructions section.				_		
	TRANSFEROR A	DDRESS		T	RANSFEROR PHONE NUMBER	
				TRANSFERO	R HSA/ARCHER MSA ACCOUNT NUM	
☐ A portion of my HS	A/Archer MSA balance	e. \$	_	nvestments in kine the investments a	d. is identified below:	
Account Number or Inve	estment Dollar A	mount or Number of	f Shares Tr	ansaction Date	Send:	
recount Number of hive	\$\$	or		insaction Bate	☐ Cash Proceeds ☐ In	
	\$	or	shares		☐ Cash Proceeds ☐ In	
	\$	or	shares	_	☐ Cash Proceeds ☐ In	
_	\$ \$	or	shares shares		☐ Cash Proceeds☐ In☐ Cash Proceeds☐ In	
Other					☐ Cash Proceeds ☐ In	
C. Delivery Instructions	count Number					
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(1) Transferee HSA Ac (2) Make check payable for the HSA of SIGNATURES certify that the information sets as set forth in this fo	e to or certificate regis	m is true and correct	ct. I direct the transfe	ror custodian/trust professional with		
(2) Make check payable for the HSA of	e to or certificate regis n contained on this for orm. I understand I sho annot provide legal a	m is true and correct ould seek the guidant dvice. I indemnify	ct. I direct the transfe nce of a tax or legal and agree to hold th	ror custodian/trust professional with ne custodian/truste	ee to transfer my HSA/Arche regard to this decision. I und	
(1) Transferee HSA Ac (2) Make check payable for the HSA of SIGNATURES certify that the information sets as set forth in this for the my custodian/trustee consume full responsibility for the material sets.	e to or certificate regis n contained on this for rm. I understand I sho annot provide legal a for the consequences	m is true and correct ould seek the guidant dvice. I indemnify of this transfer dec	ct. I direct the transfe nce of a tax or legal and agree to hold the cision. The transfered	ror custodian/trust professional with ne custodian/truste	tee to transfer my HSA/Arche regard to this decision. I und be harmless against any liable agrees to accept these fun	

ADDITIONAL INFORMATION

Purpose. The Request for Transfer to a Health Savings Account (HSA) form is designed to assist you in the non-reportable movement of assets from one HSA to another HSA or from an Archer Medical Savings Account (MSA) to an HSA.

Additional Documents. A transfer can avoid income and penalty taxes but, to be successful, additional contribution and distribution documentation may be required by your HSA's/Archer MSA's custodian/trustee.

For Additional Guidance. It is in your best interest to seek the guidance of your tax or legal professional before completing this document. Your first reference should be the HSA agreement and disclosure statement you received upon establishing your HSA or amendments provided by your custodian/trustee. For more information refer to Internal Revenue Code (IRC) Section 223 and all additional Internal Revenue Service (IRS) guidance, IRS publications that include information about HSAs, your local IRS office, or the IRS's web site at www.irs.gov.

Terms. A general understanding of the following terms may be helpful in completing your transactions.

In Kind. If an HSA/Archer MSA contains stocks, bonds, mutual fund shares, or other types of property, it may be possible to move such property to an HSA without liquidation. This type of "in kind" transfer would require that the property be reregistered in the name of the transferee HSA custodian/trustee for the benefit of your HSA. The transferee's policies, charters, or applicable law may prevent the transfer of property. Time deposits and savings accounts are not transferable.

Archer Medical Savings Account (MSA). An Archer MSA is a tax-favored savings account designed to help you pay for qualified medical expenses if you are an employee of a small employer or a self-employed individual participating in a high-deductible health plan. Archer MSA assets may be rolled over or transferred to an HSA.