



HSA TRANSFER FORM

Instructions

1. Use this form to initiate a direct transfer of funds from your HSA with another custodian to an HSA with TASC (TPA). Use the HSA Contribution form to make a rollover contribution to your HSA.
2. **Complete this form and mail it to the custodian or trustee of the HSA that you are transferring from.** Keep a copy of the form for your records.
3. If you have any questions regarding rollovers or transfers to your HSA, please call **1-800-350-3778**.

Accountholder Information

Last Name	First Name	Middle Initial
Social Security Number	Date of Birth	
Telephone Number	E-mail Address	
Street Address		
City	State	Zip Code

Transfer Instructions for Current Custodian/Trustee

Transferring Custodian/Trustee Name	Contact Name
Transferring Custodian/Trustee Address	HSA/MSA/IRA Account Number
Transferring Custodian/Trustee City, State and Zip	Transfer from* (choose one): <input type="checkbox"/> HSA <input type="checkbox"/> MSA <input type="checkbox"/> IRA
Transferring Custodian/Trustee Phone Number	

This transfer will will not close the HSA/MSA/IRA.

Directly transfer all or part \$ _____ of my HSA/MSA/IRA in the following manner:

Please make a check payable as follows: **Healthcare Bank FBO:** _____ **HSA**
Account Holder Name

Transfer checks should be sent to **Healthcare Bank at 3100 13th Avenue South, Fargo ND 58103** with a copy of this form or other correspondence including the accountholder's name and Social Security Number.

Signature of Accountholder

I hereby certify that I am the HSA accountholder or an individual authorized to execute this transaction. I have read and understand the instructions and any rules or conditions relating to and have met the requirements for making this transaction. I assume full responsibility for this transaction and will not hold TPA or Healthcare Bank liable for any adverse consequences that may result. I have not received tax or legal advice from TPA or Healthcare Bank and, if necessary, will seek the advice of a tax or legal professional to ensure my compliance with related laws. All information provided by me is true and correct and may be relied upon by TPA and Healthcare Bank. I make an irrevocable election to treat this transaction as a transfer.

Signature of HSA Accountholder _____ Date _____

Accepting HSA Custodian

HealthcareBank agrees to serve as the custodian for the Health Savings Account of the above-named individual, and as custodian, we agree to accept the funds being transferred.

Michael S. Solberg
Authorized Signature of Accepting HSA Custodian

