



Steps for Transferring to a New Custodian



Transferring to a new custodian is as easy as following three simple steps. To ensure accuracy, please proceed through each of the steps below.

1 Do you have an investment account?¹

Yes – Liquidate and move funds to your HSA cash account. Once liquidated, call the number on the back of your HSA Bank debit card to close the investment account.

No – Skip to Step 2.

2 Contact new custodian to obtain their transfer form.

Verify that new HSA is opened with custodian.

Make sure form is fully completed as instructed by new custodian including:

- Accountholder's physical signature (Required).
- Mailing address for new custodian (Required).

3 Submit form to HSA Bank by fax or mail:

Fax
(877) 851-7041

Mail
HSA Bank
PO Box 939
Sheboygan, WI 53082

Processing can take up to 7-10 business days² after HSA Bank receives the completed transfer form. HSA Bank will send a check to the new custodian as requested. Your HSA will be closed and a closing fee may apply. Please refer to your *HSA Bank Fee and Interest Rate Schedule* for details. HSA Bank is not responsible for delays in receiving the form from your new custodian or delays in funds being applied by your new custodian to your new HSA.

¹In certain circumstances your assets may be transferred in kind, please contact your brokerage provider directly to understand this potential option.

²If you have not liquidated your investment funds ahead of time, HSA Bank will contact you to complete this step prior to processing your transfer form.



Please call the number on the back of your HSA Bank debit card or visit us at www.hsabank.com

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