

Your HSA transfer

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It's easy to consolidate your accounts

Moving your HSA is simple:



1. Download the HealthEquity transfer form* at:
www.HealthEquity.com/form



2. Complete the form entirely. Since HSAs are individually held accounts, only you, the account owner, can request your account be closed and the balance be transferred.



3. Send the completed form to HealthEquity via mail, fax or email.

Address: HealthEquity, Attn: Client Services
15 W Scenic Pointe Dr. Suite 100
Draper, UT 84020

Fax: 520.844.7090

Email: dms-inbox1@healthequity.com

We'll take it from there.

HealthEquity will submit the form to your prior administrator to initiate the transfer of your balance to your HealthEquity HSA (less any applicable closing fees assessed by your prior administrator). The transferred amount will appear in your HealthEquity account within four to six weeks (processing timeframes and blackout periods vary by administrator).

Earn double interest

Transfer an existing HSA to HealthEquity and earn double interest. For details, visit www.HealthEquity.com/doubleit.

HealthEquity[®]

Building Health Savings[™]

15 West Scenic Pointe Dr., Ste 100
Draper, UT 84020
www.HealthEquity.com

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Need help?

HealthEquity is available to help you with your transfer every hour of every day:

866.346.5800

*Most administrators will accept the HealthEquity form. Please contact your current administrator to confirm.
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