

# HSA TRANSFER GUIDE

Transfer your existing HSA to HealthEquity<sup>®</sup>. You own the account. Balances roll over year after year, growing tax-free<sup>1</sup>. You never lose your contributions to your HSA

## What you need to do.

1. Download the HealthEquity Transfer/Rollover form<sup>2</sup> at:  
[www.healthequity.com/form](http://www.healthequity.com/form)
2. Fill out the HealthEquity form indicating the current administrator from which your balance will transfer.
3. Submit the completed form to HealthEquity via mail or fax.

**Address:** HealthEquity, Attn: Client Services  
15 W Scenic Pointe Dr, Ste 400  
Draper, UT 84020

**Fax:** 520.844.7090

## We will take it from here.

HealthEquity will review and forward your form to your prior HSA custodian to transfer your balance (less any applicable closing fees) to your HealthEquity Health Savings Account.

You will see the transferred amount in your HealthEquity account within 8 weeks from the date the form is submitted.

## Need more help?

Simply call HealthEquity Member Services 24/7/365.

