



Health Savings Account (HSA) Transfer Request Form Instructions

(Transferring funds from your Current HSA to your HSA at PayFlex®)

As the owner of your HSA, you must complete Sections 1, 2, and 3 of the enclosed form. Below are a few reminders as you complete the form. **If you have employer or employee payroll contributions, please do not submit this form until the final contribution has been made.**

- Section 1: Be sure to include your Phone Number. We or your current Trustee or Custodian may have to call you with follow-up questions.
- Section 2: Select only one transfer type.
- Section 3: Include the Account Number for the HSA you will be transferring to PayFlex. Your current Trustee or Custodian will be able process your request more quickly if they have all of the information on the form.
- Certification and Signature section: Sign and date the form.

Please Mail this completed transfer form to your current custodian for processing.

Do not mail this form to PayFlex Systems USA, Inc. as it will delay the processing of this request.

Note you must already have an open HSA with PayFlex for us to accept this transfer.

Please consult with a tax advisor if you have any questions prior to completing this form.

Note: Some Trustees or Custodians may require their own form in addition to this form. Please check with your current Trustee or Custodian for any specific requirements.

