



# Need to transfer your Smart-Choice HSA funds to a new account?

Here are a few simple steps to guide you through the process.



## Step 1

Contact your new HSA custodial bank. If you do not know your custodial bank, contact the HR department at your employer.



## Step 2

Tell your new custodial bank you are looking to transfer funds from a different HSA to your account and request their **trustee to trustee transfer form**.



## Step 3

Complete the transfer form and mail to WealthCare Saver, your current HSA custodian bank, at **PO BOX 162177, Altamonte Springs, FL 32716**.

## What happens next?

WealthCare Saver will review and process your transfer form. Once completed, your funds will be transferred by check to your new custodian bank. Your new custodian will deposit the funds in your new account, likely sending you a notification when the deposit is made. Exact timing may vary, but HSA transfers typically take between 2-6 weeks to be completed.