



ONE TIME IRA TO HSA ROLLOVER REQUEST

An Independent Licensee of the Blue Cross Blue Shield Association

Questions? Call Member Services at 877.293.7041.

Account Holder Information (please print)			Spending Account ID #							
<div>Last Name</div> <div>First Name</div> <div>Middle Initial</div> <div>Street Address</div> <div>City</div> <div>State</div> <div>Zip</div> <div>Email address</div>			S	A						
			Social Security # (if SA# is not known)							
			Daytime Phone							
Transfer Instructions										
<p>This transfer will be into an HSA. An IRA rollover to a HSA is a one-time tax free distribution. The "roll-over" counts as a contribution and cannot exceed the HSA contribution limit for the tax year.</p> <p>Directly transfer: <input type="checkbox"/> all or <input type="checkbox"/> part of the account identified below to HealthEquity, Inc. as Custodian of the _____ account for tax year _____. (Account Holder's Name)</p> <p>This transfer: <input type="checkbox"/> will <input type="checkbox"/> will not close the account.</p>										
Asset Liquidation Instructions										
Description	Total Quantity	Quantity To Be Transferred	Liquidate Immediately	Liquidate at Maturity	Transfer In Kind					
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Current Trustee/Custodian Info (transferring FROM)										
<div>Trustee/Custodian's Name</div> <div>Street Address</div> <div>City</div> <div>State</div> <div>Zip</div> <div>Trustee/Custodian's Phone#</div> <div>Trustee/Custodian's Account ID#</div>										
Signature of HSA Account Holder										
<p>I understand I am limited to one IRA to HSA trustee rollover and certify I have not made another rollover.</p> <div>HSA Account Holder Signature</div> <div>Date</div>										

Please note some carriers or fund providers may require notarization or a medallion signature guarantee. To avoid any delays, please check with your IRA administrator to verify its requirement before submission and whether a signature guarantee is required. The Medallion Signature Guarantee may be executed by banks, broker dealers, credit unions, national securities exchanges and savings associations that participate in STAMP, SEMP or NYSE-MSP. A notary public is not a substitute for a Medallion Signature Guarantee.

Medallion Signature Guarantee Stamp and Signature _____

Send via secured email only:
capitalbluecross.documents@hellofurther.com

Fax to:
866.231.0214

Mail to:
PO Box 860684
Minneapolis, MN
55486-0684

Overnight:
Lockbox 860684
1200 Energy Park Dr
St Paul, MN 55108-0684