HSA Trustee to Trustee Transfer Request Form

Accordia Bank

To request an HSA Transfer from your prior custodian to Accordia Bank, **please complete this form and: Upload the completed form to: *https://fs26.formsite.com/Documents/Accordia-AH-Doc-Upload/index***

Part 1: Account Holder Information

Name: (Please Print) _____ DOB _____ Last 4 digits of SSN#_____

Address: _____ City: _____ State: _____ Zip: _____

Phone: (_____) _____ Email Address:_____

Account Number _____("To" Account; Refer to your monthly HSA statement to find the number)

**Accordia Bank maintains your mailing and email address on record. To update your mailing and email address, you must contact Accordia Bank.*

Part 2: Transfer Information

This request is for a Trustee-to-Trustee transfer. The funds currently in a Health Savings Account (HSA) or Archer Medical Savings Account (MSA) with another Trustee or Custodian are to be directly transferred to Accordia Bank. If EFT is unavailable, mail a check payable to "Quill Bank FBO [Account Owner Name] HSA" to Accordia Bank, P.O. Box 55210, Little Rock, AR 72215. Include the account owner's Accordia HSA account number on the check or accompanying documentation.

Current HSA/MSA Trustee/Custodian Information:

Institution Name: _____ Phone: (_____) _____

Address: _____ City: _____ State: _____ Zip: _____

Current HSA/MSA Account Number:_____("From Account")

Transfer Authorization:

I, _____, authorize _____ (current custodian) to completely transfer:

☐ **ALL** or ☐ **PART** of my account in the following manner. If partial transfer, amount to transfer is: $ _____

This transfer ☐ **Will close** my account. ☐ **Will Not close** my account.

Part 3: Account Owner Signature

(Sign Here for Trustee-to-Trustee Transfer)

I authorize the transfer of the HSA or Archer MSA assets in the manner described above, and certify that all of the information provided by me may be relied upon by the Trustee or Custodian.

Account Owner Signature _____ **Date** ____ / ____ / _____
mm/dd/yyyy

Instructions Current HSA/MSA Trustee/Custodian:

☐ Send an Electronic Funds Transfer (EFT) to Accordia Bank for the above account to the following:

Routing #124302927
Account #51047868

For Internal Use Only: Accepting HSA Custodian

Our organization agrees to serve as the new Custodian for the account of the above named individual, and as Custodian, we agree to accept the assets being transferred.

Authorized Signature of New Custodian:



Upload the completed form to: *https://fs26.formsite.com/documents/Accordia-Document-Upload/index.*

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How to Complete the HSA Trustee to Trustee Transfer Request Form

Part 1: Account Holder Information

Complete this section with your personal information. If you need to locate your new HSA account number, you can find it at https://login.accordia.bank/login. Once logged in, click **Statements > Monthly Statements > Select Year > Select Month > View Statement**. Your account number will appear on the right corner of your statement. You may also contact customer service.

Please note: Accordia Bank maintains your mailing and email address on record. To update your mailing address, you must contact Accordia Bank.

Part 2: Transfer Instruction and Method

The account number requested in Part 2 of the Transfer Request Form is your current / prior HSA Account Number. The easiest place to find you 12-digit account number is in your online account when you sign in. You can also find your account number on your HSA statements.

Select **ALL** to transfer your full HSA balance. Enter your account balance for the **Amount to Transfer** and select **this transfer will close my account** to avoid any future monthly or account closure fees.

Part 3: Signature

Sign and date where indicated in Part 3 to authorize the transfer request. Your signature allows the current HSA custodian / provider to release you funds to your new HSA provider, Accordia Bank.

HSA Transfer Request Form Frequently Asked Questions

Q: How do I submit the Transfer Request Form?

A: Please upload the completed form at: *https://fs26.formsite.com/Documents/Accordia-AH-Doc-Upload/index*

Q: Do I need to know the exact amount to transfer?

A: No. If you want to transfer your full HSA balance, simply select ALL in the Transfer Instructions section. However, if you wish to transfer a partial amount. You will need to indicate the exact amount you wish to have transferred.

Q: Is the account in Part 2 of the HSA Transfer Request Form the same as the account number in part 1?

A: No, the account number in Part 2 is your current / prior HSA account number, while Part 1 in your new account number

Q: Who administers my new HSA?

A: Quill Bank, through its Accordia Bank division, serves as the HSA custodian. Accordia Bank and its service providers support account administration. The account owner directs permitted investment selections; neither Quill Bank nor Accordia Bank provides investment, legal, or tax advice through this form.

Accordia Bank

Email: AccordiaCare@CDHWallet.com

Call: 800-706-65

Visit: https://www.accordia.bank

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