WealthCare Saver

Trustee to Trustee Transfer Request

##37WCS##################

Please complete this form to transfer assets from your existing HSA with WealthCare Saver* to your new HSA custodian. If you want your HSA funds to be distributed directly to you from your existing HSA account, please use the HSA Rollover Distribution form. You may wish to review IRS Publication 969 found at www.irs.gov/pub/irs-pdf/p969.pdf.

Some custodians may require you to submit their forms in addition to this form. Please check with your new custodian to ensure the necessary documentation is completed. **Please complete a separate form for each HSA to be transferred.**



Fax completed form to:
866.287.2022



Mail completed form to:
WealthCare Saver*
P.O. Box 162177
Altamonte Springs, FL 32716



Questions about this form?
866.287.5675
M-F, 8 a.m. - 8 p.m. ET

Section 1: Account Information

ACCOUNT NUMBER

LAST NAME | FIRST NAME | MIDDLE INITIAL

EMPLOYER NAME | LAST FOUR OF SSN

EMAIL ADDRESS | TELEPHONE NUMBER

STREET ADDRESS

CITY | STATE | ZIP CODE

Section 2: Specify Transfer Amount

☐ Transfer my entire balance and close my account

☐ Transfer a specific amount:

$

Transfer Amount

Complete Next Page ›

Section 3: New Custodian Information

BANK NAME

TELEPHONE NUMBER (PLEASE INCLUDE AREA CODE)

STREET ADDRESS

CITY | STATE | ZIP CODE

Section 4: Signature

I certify that: (1) I am legally authorized to execute this transaction, (2) that all information provided by me is true and accurate, (3) no tax advice has been given to me by WealthCare Saver*, or its affiliates, (4) all decisions regarding this HSA are my own. I expressly assume the responsibility for any adverse consequences and tax reporting requirements which may arise from this transaction and I agree that neither WealthCare Saver*, nor its affiliates, shall be held liable for any adverse consequences that may result. I understand that I may consult a tax professional or legal counsel. I acknowledge that I have read and understood the applicable terms and conditions.

SIGNATURE OF ACCOUNT HOLDER | DATE

*WealthCare Saver is a dba of Alegeus Technologies, LLC, a licensed Non-Bank Custodian