



Instructions: Use this form to transfer your current HSA funds. Complete and return this form to us by email at HSA@avidiahealthcaresolutions.com or by mail at Avidia Bank, P.O. Box 161390, Altamonte Springs, FL 32714. Once this completed form is signed and returned to Avidia Bank, we will initiate the Trustee to Trustee Transfer on your behalf. Depending upon the previous Custodian/Trustee Bank's processing time, it may take 4-6 weeks before your funds are sent to Avidia Bank.

Account Holder's Personal Information:

First Name	MI	Last Name		
Street Address				Apt #
City	State			Zip
Social Security #	-	-	Daytime Phone #	
Email Address				
Avidia Bank Account #				

Request Type:

Trustee to Trustee Transfer: I currently have HSA funds with another Trustee/Custodian and want to transfer the funds directly to my HSA account at Avidia Bank.

Transfer Information:

Current Custodian Bank Name:	Current HSA Account #:		
Street Address			
City	State	Zip	
Phone #	Fax #		

Transfer Instructions:

Transfer the entire balance of the current HSA listed above to Avidia Bank and CLOSE my account and liquidate investments, if applicable.

Please Transfer \$_____ of the current HSA listed above to Avidia Bank and **DO NOT CLOSE** my account.

Make Check Payable to: Avidia Bank as Custodian for: _____
Account Owner's first and last name

Current Custodian:

Mail the Transfer Check to Avidia Bank; P.O. Box 981012, Boston, MA 02298-1012

Account Holders Authorization:

I authorize the transfer of the HSA assets in the manner described above and certify that all of the information provided by me is correct and may be relied upon by the Custodian. I understand that I am responsible for determining that this HSA transfer qualifies under the rules and conditions applicable to such transfers and agree to abide by those rules and conditions. I assume responsibility for any tax consequences or penalties that may apply to the transfer of these assets and I agree that the Custodian shall in no way be held responsible.

X _____
Account Owner Signature Date

Accepting HSA Custodian:

Avidia Bank agrees to serve as the new Custodian for the account of the individual who is authorizing the transfer. As the newly designated Custodian, we agree to accept the aforementioned assets transferred. Please remit a check payable to Avidia Bank as Custodian of the HSA Account Number listed above for the amount listed in the Transfer Instructions

X Mary Newton
Authorized Signature of New Custodian Date

