

Consider transferring your HSA

It's easy to consolidate your health savings accounts



Need help?

HealthEquity is available to help you with your HSA transfer every hour of every day:

844-354-0116

Save with an HSA

We make it easy for you to manage your TIAA Health Savings Account administered by HealthEquity by providing convenient access online and through the mobile app. You can also potentially save on administration fees from your prior HSA custodian by transferring your HSA to your TIAA HSA administered by HealthEquity.

Moving your HSA is simple:

- 1 Download the HealthEquity transfer form¹ at: **HealthEquity.com/form**.
- 2 Complete the form entirely.

Since HSAs are individually owned accounts, only you (the account owner) can request your account be closed and the balance be transferred.

- 3 If you have any of your HSA balance invested in mutual funds or a brokerage account at your prior HSA custodian, you may need to liquidate and transfer to the cash account for the full HSA balance to be transferred. Contact your prior HSA custodian for more details.
- 4 Send the completed form to HealthEquity via email, mail or fax.

Email: transfer@healthequity.com

Mail: HealthEquity, Attn: Operations
15 West Scenic Pointe Drive, Suite 100
Draper, UT 84020

Fax: 801-846-2929

We'll take it from there

HealthEquity will submit the form to your prior HSA custodian to initiate the transfer of your account balance to your TIAA HSA (less any applicable closing fees that may be assessed by your prior custodian). The transferred amount will become available in your TIAA HSA generally within four to six weeks (processing timeframes and blackout periods vary by HSA custodian).

Earn *double* interest

Transfer your existing HSA to the TIAA HSA administered by HealthEquity and earn double interest. For details, visit **HealthEquity.com/doubleit**.



¹ Most custodians will accept the HealthEquity form. Please contact your current HSA administrator to confirm.

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This material is not a recommendation to buy, sell, hold, or roll over any asset, adopt an investment strategy, retain a specific investment manager or use a particular type of health coverage or account type. It does not take into account the specific health status, investment objectives, tax and financial condition, or particular needs of any specific person. Federal, state, and local tax treatment of HSAs and distributions may vary. HSA holders should discuss their specific situation with their legal, tax or financial professional. Distributions for qualified medical expenses are tax-free. State and local tax treatment of health savings accounts and distributions may vary. Health savings account holders should discuss their specific situation with their legal, tax, or financial professional.

Prior to transferring your HSA, consider your other options. You may be able to leave money in your current account, withdraw cash or transfer the assets to a new HSA. Compare the differences in investment options, services, fees and expenses.

HealthEquity nor The TIAA group of companies does not provide tax or legal advice. Taxpayers should seek advice based on their own particular circumstances from an independent tax advisor.

Health savings accounts (HSAs) are individual custodial accounts offered or administered by HealthEquity, Inc. TIAA and HealthEquity are not legally affiliated, and TIAA HSAs are not a plan established or maintained by TIAA or an employer. TIAA may receive a referral fee from HealthEquity for each HSA opened.

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