



Aetna HealthFund® HSA

ROLLOVER/TRANSFER REQUEST FORM

The Health Savings Account Rollover/Transfer Request Form can be used to:

- 1) Rollover funds into your Aetna HealthFund HSA which have already been distributed to you from another custodian, or to
- 2) Transfer monies directly from another custodian into your Aetna HealthFund HSA. We recommend you contact your current custodian to ensure that all of their requirements for transferring funds are met. If your current custodian allows this form, it can be mailed to 15 West Scenic Pointe Drive, Suite 400, Draper, Utah 84020 or faxed to 801-727-1005. If you have questions, please call member services at 866-382-3512.

Part I - Account Holder Information - Please Print

Account Holder Full Legal Name:	Social Security Number:	Date of Birth:	
Address:	City:	State:	ZIP:
Contact Phone:	Health Insurance Company:		
Email Address:	Coverage Effective Date:	Coverage Type: <input type="checkbox"/> Single <input type="checkbox"/> Family	

Please select one of the following:

- I already have an Aetna HealthFund HSA at HealthEquity. Account No. _____
- I am currently setting up an Aetna HealthFund HSA through my employer.
Employer Name: _____ Phone: _____
- I am enclosing an enrollment form together with this transfer form to establish a new Aetna HealthFund HSA.

Part II – Rollover Amount \$ _____ (Do not complete for Transfer)

Part III - Transfer Information (Do not complete for Rollover)

This request is for a custodian-to-custodian transfer or an employer-to-custodian transfer. The monies currently held by another custodian/employer are to be directly transferred to an Aetna HealthFund HSA at HealthEquity.

Current Custodian Info (for HSA/IRA/MSA Transfer) | Current Employer Info (for FSA/HRA Transfer)

Financial Institution (or Employer Name for FSA/HRA):	Phone:		
Address:	City:	State:	ZIP:
Current HSA/IRA/MSA/HRA/FSA Account Number:	Dollar Amount to be transferred (if known): \$ _____		
This transfer <input type="checkbox"/> WILL <input type="checkbox"/> WILL NOT close my existing account.			

Please indicate the current account type that the monies will be coming from:

- IRA (Individual Retirement Account)
- MSA (Medical Savings Account)
- HRA (Health Reimbursement Account)
- FSA (Flexible Spending Account)
- Another HSA (Health Savings Account)

Part IV - Account Holder Signature (Do not complete for Rollover)

I authorize the transfer of the account assets in the manner described above, and certify that all of the information provided by me is accurate.

Account Holder - Signature Required:

Date:

Notary Seal (when required by current custodian):

CURRENT CUSTODIAN INFORMATION:

Check Option: Make a check payable to HealthEquity and mail it along with this form to:
HealthEquity Inc.
15 West Scenic Pointe Drive, Suite 400
Draper, UT 84020

RULES AND CONDITIONS APPLICABLE TO ROLLOVERS AND TRANSFERS

ROLLOVERS

A rollover is a way to move money or property from a Medical Savings Account (MSA) or existing Health Savings Account (HSA) to an Aetna HealthFund HSA. The Internal Revenue Code (IRC) limits how many rollovers may be taken, how quickly rollovers must be completed, and how the custodian must report the transaction. By properly completing this form you are certifying to the custodian that you have satisfied the rules and conditions applicable to your rollover and that you are making an irrevocable election to treat the transaction as a rollover.

1. Timelines

The funds you receive from an MSA or HSA must be deposited into an HSA within 60 days after you receive them. When counting the 60 days, include weekends and holidays. Receipt generally means the day you actually have the funds in hand. For example, the 60 days would begin on the day you pick up the check from the Custodian or you receive the check in the mail. The 60 day rule is set by the IRS and cannot be changed by HealthEquity.

2. Twelve-Month Restriction

You are entitled to one distribution per year per HSA which may be rolled over. Twelve (12) months must pass after receipt of one distribution which you rollover before you may take another distribution from the same HSA to rollover. The focus is on distributions out of an HSA.

TRANSFERS

If you instruct the custodian of your HSA or MSA to transfer funds directly to the custodian of another HSA, the transfer is not considered a rollover. There is no limit on the number of these transfers.

If your employer instructs the custodian of your HRA/FSA to transfer funds directly to the custodian of another HSA, the transfer is not considered a rollover.

Beginning in 2007, individuals can make a one-time transfer from their IRA to an HSA, subject to the contribution limits applicable for the year of the transfer. Additional information can be found at www.IRS.gov.