

**HSA DIRECT TRANSFER  
INSTRUCTIONS (FORM 2625H)**

**Please Print or Type**

TO: \_\_\_\_\_  
Current HSA, MSA, or IRA Fiduciary Account Number at Current Institution

\_\_\_\_\_  
Mailing Address of Current HSA, MSA, or IRA Fiduciary

Please liquidate and transfer the amount indicated below from the Health Savings Account (HSA), Archer Medical Savings Account (MSA), or traditional IRA you are maintaining on my behalf to the HSA I have established at my credit union (named in the Identifying Information section of this form). **Make the check payable as follows: Name of Credit Union, F/B/O HSA Owner's Name.** Note on the check that it is for deposit to account number \_\_\_\_\_ at the credit union. Attach the check to a copy of this form and send it to the credit union at the address provided below. My credit union can only accept a check to implement this transfer, so please don't send it in any other form.

**Type of Transfer**

- HSA to HSA  
 Archer MSA to HSA  
 Traditional IRA to HSA

**IDENTIFYING INFORMATION**

Account Owner's Name (First, Initial, Last) \_\_\_\_\_ Credit Union Name \_\_\_\_\_  
Social Security Number \_\_\_\_\_ HSA Suffix \_\_\_\_\_ Credit Union Mailing Address \_\_\_\_\_  
\_\_\_\_\_  
CUID (Credit union will complete.) \_\_\_\_\_ City, State, ZIP \_\_\_\_\_  
( ) \_\_\_\_\_  
Phone Number \_\_\_\_\_  
\_\_\_\_\_  
Contact Person at Credit Union \_\_\_\_\_

**AMOUNT AND TIMING OF TRANSFER**

Liquidate the current investment and transfer the proceeds as follows. **Check one box in each column.**

**Amount to transfer:**

1. \$ \_\_\_\_\_  
 2. The entire amount in my account and close my account.

**Make this transfer:**

1. On \_\_\_\_\_ Date (MM/DD/YYYY)  
 2. Immediately.  
 3. At maturity of the investment.

**CREDIT UNION'S SIGNATURE**

The credit union named above agrees to act as successor trustee or custodian and accept the transfer described above for deposit to the HSA established on behalf of the owner named above.

**X** \_\_\_\_\_  
Credit Union Representative's Signature Date (MM/DD/YYYY)

**ACCOUNT OWNER'S SIGNATURE**

I have established an HSA with the credit union named above. I authorize the current fiduciary of my HSA, MSA, or traditional IRA to liquidate the above described portion of my interest in the plan and send the proceeds to my credit union as directed on this form. (The HSA owner should check with the fiduciary that currently has the funds to determine whether a signature guarantee is required.)

**X** \_\_\_\_\_  
Account Owner's Signature Date (MM/DD/YYYY)