

# ONE TIME IRA TO HSA ROLLOVER REQUEST



Account Holder Information (please print)			Spending Account ID #							
<hr/> Last Name	<hr/> First Name	<hr/> Middle Initial	S	A						
<hr/> Street Address			<b>Social Security # (if SA# is not known)</b>							
<hr/> City State Zip			<b>Daytime Phone</b>							
<hr/> Email address										
Transfer Instructions										
<p>This transfer will be into an HSA. An IRA rollover to a HSA is a one-time tax free distribution. The "roll-over" counts as a contribution and cannot exceed the HSA contribution limit for the tax year.</p> <p>Directly transfer: <input type="checkbox"/> all or <input type="checkbox"/> part of the account identified below to <b>Horizon</b> as Custodian of the _____                      account for tax year _____. <span style="float: right;">(Account Holder's Name)</span></p> <p>This transfer: <input type="checkbox"/> will <input type="checkbox"/> will not close the account.</p>										
Asset Liquidation Instructions										
Description	Total Quantity	Quantity To Be Transferred	Liquidate Immediately	Liquidate at Maturity	Transfer In Kind					
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>					
Current Trustee/Custodian Info (transferring FROM)					Accepting Account Trustee or Custodian					
<hr/> Trustee/Custodian's Name					Further acts as the custodian operating on behalf of Horizon. As Custodian, we agree to accept the assets being transferred.  Account ID of Accepting HSA _____ <span style="float: right;">(Spending Account ID #)</span>  <div style="display: flex; justify-content: space-between;"> <span>_____</span> <span>_____</span> </div> <div style="display: flex; justify-content: space-between;"> <span>Authorized Signature of Horizon</span> <span>Date</span> </div>					
<hr/> Street Address										
<hr/> City State Zip										
<hr/> Trustee/Custodian's Phone#										
<hr/> Trustee/Custodian's Account ID#										
Signature of HSA Account Holder										
I understand I am limited to one IRA to HSA trustee rollover and certify I have not made another rollover.										
<hr/> HSA Account Holder Signature						<hr/> Date				

**Please note** some carriers or fund providers may require notarization or a medallion signature guarantee. To avoid any delays, please check with your IRA administrator to verify its requirement before submission and whether a signature guarantee is required. The Medallion Signature Guarantee may be executed by banks, broker dealers, credit unions, national securities exchanges and savings associations that participate in STAMP, SEMP or NYSE-MSP. A notary public is not a substitute for a Medallion Signature Guarantee.

Medallion Signature Guarantee Stamp and Signature \_\_\_\_\_

Questions? Call Member Services at 1-888-215-0025.

**Send via secured email only:**  
 HorizonMyWay.Documents@Hellofurther.com

**Fax to:**  
 866-231-0214

**Mail to:**  
 P.O. Box 64193  
 St. Paul, MN 55164-0193