

# ONE TIME IRA TO HSA ROLLOVER REQUEST



Account Holder Information (please print)	Spending Account ID #																								
<div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> <span>Last Name</span> <span>First Name</span> <span>Middle Initial</span> </div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">Street Address</div> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> <span>City</span> <span>State</span> <span>Zip</span> </div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">Email address</div>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%; text-align: center; border: 1px solid black;">S</td> <td style="width: 10%; text-align: center; border: 1px solid black;">A</td> <td style="width: 10%; text-align: center; border: 1px solid black;"></td> <td style="width: 10%; text-align: center; border: 1px solid black;"></td> <td style="width: 10%; text-align: center; border: 1px solid black;"></td> <td style="width: 10%; text-align: center; border: 1px solid black;"></td> <td style="width: 10%; text-align: center; border: 1px solid black;"></td> <td style="width: 10%; text-align: center; border: 1px solid black;"></td> </tr> <tr style="background-color: #e0e0e0;"> <td colspan="8" style="text-align: center; padding: 5px;"><b>Social Security # (if SA# is not known)</b></td> </tr> <tr style="background-color: #e0e0e0;"> <td colspan="8" style="text-align: center; padding: 5px;"><b>Daytime Phone</b></td> </tr> </table>	S	A							<b>Social Security # (if SA# is not known)</b>								<b>Daytime Phone</b>							
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### Transfer Instructions

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.

Directly transfer:  all or  part of the account identified below to **Horizon** as Custodian of the \_\_\_\_\_  
(Account Holder's Name)  
 account for tax year \_\_\_\_\_.

This transfer:  will  will not close the account.

### 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
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<div style="border-bottom: 1px solid black; margin-bottom: 5px;">Trustee/Custodian's Name</div> <div style="border-bottom: 1px solid black; margin-bottom: 5px;">Street Address</div> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> <span>City</span> <span>State</span> <span>Zip</span> </div> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> <span>Trustee/Custodian's Phone#</span> <span>Trustee/Custodian's Account ID#</span> </div>	<p>Further acts as the custodian operating on behalf of Horizon. As Custodian, we agree to accept the assets being transferred.</p> <p>Account ID of Accepting HSA _____  <small>(Spending Account ID #)</small></p> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div style="border-top: 1px solid black; width: 60%;"></div> <div style="border-top: 1px solid black; width: 30%;"></div> </div> <p style="text-align: center; margin-top: 5px;">Authorized Signature of Horizon <span style="float: right;">Date</span></p>
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### 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.

HSA Account Holder Signature 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:**  
 PO Box 982814  
 El Paso, TX 79998-2814