

**HEALTH SAVINGS ACCOUNT  
ROLLOVER CERTIFICATION**



Account Holder Information (please print)			Spending Account ID #							
Last Name _____ First Name _____ Middle Initial _____			S	A						
Street Address _____			<b>Social Security # (if SA# is not known)</b>							
City _____ State _____ Zip _____			<b>Daytime Phone</b>							
Email address _____										

**Rollover Information**

A rollover moves assets from one account to another. You can make a rollover from:

- an HSA to a HSA
- an MSA to a HSA
- an MSA to an MSA

You can rollover part or all of the assets in an account. A rollover differs from a transfer in that when you request a transfer, the assets are moved directly from the current custodian to the new custodian. When you perform a rollover, the amount you specify will be distributed to you in cash.

You must deposit the rollover in another account within 60 calendar days after you receive the distribution. The IRS allows one rollover transaction per account per year. Once designated, a rollover contribution is irrevocable.

I wish to make a single rollover contribution by check (Please make checks payable to Horizon).

Amount: \$ \_\_\_\_\_

I wish to initiate a one-time pull from the account I have indicated on the reverse side of this form.

I wish to initiate a one-time pull from the existing bank account on file at Horizon, bank account number: \_\_\_\_\_

Amount: \$ \_\_\_\_\_

**Account Holder Signature**

I am fully responsible for any taxes or losses that I incur due to this rollover.

I declare this rollover of \$ \_\_\_\_\_ to be an irrevocable rollover contribution.

\_\_\_\_\_

Account Holder Signature Date

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

## Authorization for Electronic Transfer of Funds

**To begin the electronic transfer of funds, please complete the following:**

checking or  savings account

Name of member (please print): \_\_\_\_\_

Spending Account ID or Social Security Number: \_\_\_\_\_

Employer's Name (if applicable): \_\_\_\_\_

Bank name: \_\_\_\_\_

Bank telephone number: \_\_\_\_\_

Bank ABA Routing Number: \_\_\_\_ \_

(The ABA routing number is the nine-digit number located in the bottom left corner of your check or deposit slip)

Bank Account Number: \_\_\_\_\_

Signature of Bank Account Holder \_\_\_\_\_ Signature Date: \_\_\_\_\_

Please allow 10-15 business days from the date this form is received by Horizon for your request to be processed.