



Health Savings Account (HSA) Transfer to UMB from other Trustee

Instructions for Health Savings Account owner:

As the Account Owner you are required to complete sections A, B, & C.

1. Make sure to include your Phone Number in Section A. It may be necessary for your current Trustee/Custodian or UMB to contact you with follow-up questions.
2. In section B you must select only one of the three transfer types.
3. Make sure to include your Account Number in section C. Your current Trustee/Custodian will be able to process your HSA funds transfer to UMB quicker if they have this critical piece of information.
4. After reading the entire form and reviewing each of the boxes to make sure all information is correct; sign and date the form in the space provided.
5. **Mail this Trustee Transfer Form to your current Trustee/Custodian. Refer to Section C for their mailing address.**