



STERLING HSA®

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Oakland, CA 94612

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Oakland, CA 94612

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Transfer of Funds Request Form

This form transfers funds from another institution to your Sterling HSA account. Please fill out the following form, mail the original to your current IRA/FSA/HSA/MSA administrator where your funds are currently being held, and send a copy to:

Sterling HSA
PO Box 71107, Oakland, CA 94612

Sterling Accountholder Information

| | | | |
|----------------|-------|--------------------|-----|
| Name | SSN # | Sterling Account # | |
| Street Address | City | State | Zip |
| Date of Birth | Phone | Email | |

Transfer Request to Current Custodian / Trustee

| | | | |
|--------------------------------|--------------|--------------|-----|
| Present Custodian/Trustee Name | Account # | Phone Number | |
| Street Address | City | State | Zip |
| Date of Birth | Phone Number | Email | |

I authorize and direct you, my present IRA/FSA/HSA/MSA Custodian/Trustee, to transfer

All my funds Partial funds in the amount of \$ _____

in my IRA FSA HSA MSA account to Sterling HSA.

I authorize and direct you to send my assets to my Sterling HSA account as follows:

By check payable to Sterling HSA, PO Box 71107, Oakland, CA 94612

Signature

I certify that I have or will establish an account with Sterling HSA.

| | |
|-----------|------|
| Signature | Date |
|-----------|------|