

TRANSFER OF ASSETS REQUEST FORM

WE MAKE
THE COMPLEX
SIMPLE

This form transfers funds from your Sterling account to your brokerage account. Please fill in the requested information, sign and mail to Sterling at P.O. Box 71107, Oakland, CA 94612. Your signature on this form indicates that you agree to indemnify and hold Sterling harmless from any and all costs, obligations, losses, claims, damages and expenses resulting from this transfer of assets. Sterling charges a small annual fee for this service that includes 2 transactions at no additional cost. More than 2 transactions will incur a per transaction fee.

There is a minimum balance requirement of \$20 which must be kept in your HSA. The monthly maintenance fee on the HSA account will continue to be charged, for this reason we ask you to also leave a minimum of one year's worth of fees in your HSA, or Service Fee Balance.

SECTION 1: INFORMATION ABOUT YOUR HEALTH SAVINGS ACCOUNT

Mr. Ms. Mrs. Dr.

Please transfer \$ _____
from my Sterling account into my brokerage ac-
count.

Name (Please Print Accountholder Name)

Sterling Account Number: _____

Signature of Accountholder

Date

SECTION 2: BROKER INFORMATION

Name of Firm

Representative's Name/ AE #

Home Office Address

Branch Office Address

Broker's Telephone Number