

HSA Close Account

Complete this form to close your HSA account. Prior to submitting this form, turn off auto-investments (if applicable), liquidate your investment balance and confirm all pending transactions have posted to your account. You may wish to review IRS Publication 969 found at www.irs.gov/pub/irs-pdf/p969.pdf.



Fax completed form to:
Fax Number
determined by
product partner choice



Mail completed form and current account statement to:
Mailing Address
determined by
product partner choice



Questions about this form?
800-499-3539
8:30-5:00 Monday-Friday

Section 1: Account Information

ACCOUNT NUMBER (specific to product partner choice)

LAST NAME

FIRST NAME

MIDDLE INITIAL

EMPLOYER NAME

SOCIAL SECURITY NUMBER

EMAIL ADDRESS

TELEPHONE NUMBER

STREET ADDRESS

CITY

STATE

ZIP CODE

Section 2: Disbursement Instructions Tran Code: 168 (Close Account Distribution)

Deposit funds electronically to the direct deposit bank account on file
**If no bank account on file, a check will be mailed*

Mail check to the address above

Section 3: Signature

I certify that I am legally authorized to receive payment(s) from this HSA account and that all information provided by me is true and accurate. I further certify that no tax advice has been given to me by WealthCare Saver* as Custodian, or its affiliates. All decisions regarding this distribution are my own. I expressly assume the responsibility for any adverse consequences which may arise from this distribution and I agree that neither WealthCare Saver as Custodian, nor its affiliates, shall be held liable for any adverse consequences that may result. I understand that I may consult a tax professional or legal counsel. I acknowledge that I have read and understand the terms and conditions applicable to a distribution, as set forth in the Custodial Agreement provided when opening this HSA account. I understand that any applicable fees will be deducted from the distribution amount requested. (See Health Savings Account Fee Schedule found on the Portal).

SIGNATURE OF HSA ACCOUNT HOLDER

DATE

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