

Rollovers and Trustee to Trustee Transfers

Health Savings Account (HSA)

View your HSA on Fidelity.com

Account Number: Connected to Your Health Plan Update Personal Info Update Beneficiaries

Summary Contributing Paying Investing Tax Information

YOUR CONTRIBUTIONS OTHER WAYS TO CONTRIBUTE IRS LIMITS

More ways to put money into your HSA

Online

With electronic funds transfer (EFT), you can move after-tax money from a Fidelity account or an outside bank account to your HSA.

Move Money

Personal check

You, or anyone who'd like to contribute to your HSA, can write a check to Fidelity Brokerage Services LLC. View what to include and where to mail it.

Print Deposit Slip (PDF)

Be sure to count after-tax contributions toward your total to avoid going over your annual contribution limit. You may be able to take your after-tax contributions as a deduction on your federal income tax return.

Transfer from another HSA

If you decide to transfer from another HSA, complete the online transfer form. The transfer will not count toward your annual HSA contribution limit and you can keep the tax advantages of your old HSA.

Transfer money

If you've already taken your money out of an old HSA

You usually have 60 days after the date of receipt to roll it over to your Fidelity HSA. You can do this only once during a 12-month period.

Write a personal check to Fidelity Brokerage Services LLC. Important: Make a note on the check that it's for a 60-day rollover. View what to include and where to mail it

Print Deposit Slip (PDF)

For illustrative purposes only.

Fidelity Transfer assets

Tell us where you're moving your assets from

Select your current firm

Use your latest statement to get the information you need to complete this transfer.

You can either

Search for your firm

Or select from these common firms

Vanguard

Computershare

T. Rowe Price

JP Morgan Chase

Charles Schwab

Ameriprise

Select the information that matches your Vanguard statement.

Account number format

☒ Your account number is 11 digits, e.g., 12345678901
 ☐ Your account number is 8 digits, e.g., 12345678
 ☐ None of the above

Based on your selection, your firm is Vanguard. Now, let's move on to the next step.

Exit Next

Fidelity INVESTMENTS

Questions? Go to Fidelity.com or call 800-343-3548.

Deposit Slip

Use this form to make deposits into your Fidelity account. Type on screen or fill in using CAPITAL letters and black ink.

Write your account number in the memo field of the check(s) and mail to:

- Regular mail: Fidelity Investments, PO Box 770001, Cincinnati, OH 45277-0047
- Overnight mail: Fidelity Investments, 100 Crosby Parkway, KCH, Covington, KY 41015-4325

Helpful to Know

- Do NOT use this form to purchase individual securities other than mutual funds. Visit Fidelity.com or call a representative at 800-343-3548 to place a trade after this deposit has posted to your account.
- All deposits must meet mutual fund eligibility and minimum investment requirements as described in the applicable fund prospectus or fact kit. You cannot invest in accounts that are restricted. If purchasing a new fund, you must have read the prospectus and agree to its terms.
- Only checks payable to the Account Owner, Fidelity Brokerage Services LLC, or to the Fidelity fund name will be accepted. Fidelity does not accept third-party checks. Checks payable to the Account Owner must be endorsed.
- Make checks payable as follows:
 - Brokerage Accounts (all account types)—Fidelity Brokerage Services LLC
 - Mutual Fund Accounts (all account types)—Fidelity Fund Name (e.g., Fidelity Government Cash Reserves)

1. Account Owner

Name

Fidelity Account Number

Daytime Phone

Extension

2. Deposit Information All deposits may be subject to a clearing period of four business days.

Deposit Type:

☐ Nonretirement
 ☐ Current Year: Traditional IRA, Roth IRA, or HSA
 ☐ Direct Corporate Rollover (e.g., 401(k), 403(b), 457)

☐ Cash Management Account
 ☐ Prior Year: Traditional IRA, Roth IRA, or HSA
 ☐ Roth Conversion

☐ 529 College Savings Plan
 ☐ ABLE Account
 ☐ 60-Day Rollover
 ☐ SEP IRA Employer Only
 ☐ Defined Contribution Retirement Plan/Keogh Employer Only

List Checks:

Check Number

Amount

Check Number

Amount

Total Investment

\$ 0

Deposit Instructions For deposits to mutual funds within a Brokerage or Mutual Fund Only account:

Fund Name

Symbol

Amount

Fund Name

Symbol

Amount

20

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