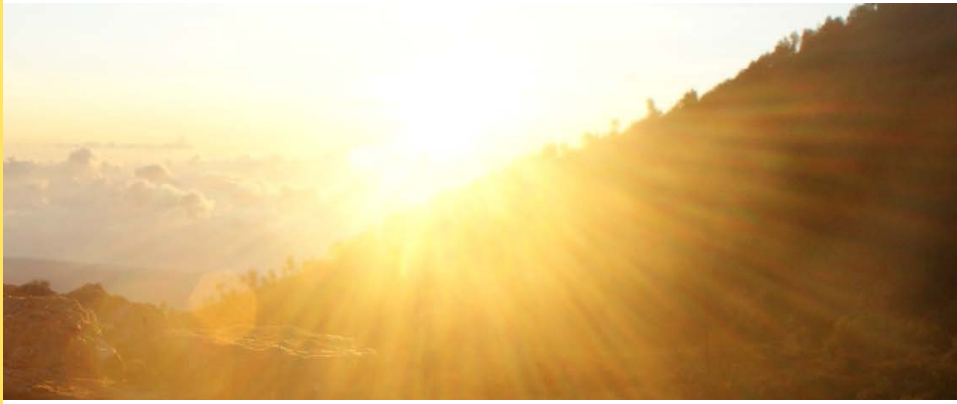


NBS Makes it Easy to Move or Consolidate Accounts

Transfer My HSA



How Do I Move My HSA?

Moving your HSA is simple. Just follow the step-by-step instructions below.

1

Download the National Benefit Services (NBS) HSA Transfer/Rollover Form through our website, my.nbsbenefits.com. You can find the form under Resources > HSA Resources > HSA Forms and Online Resources > HSA Transfer Form.

2

Complete the form, including signature. As a reminder, the account owner must request the transfer. No other party can initiate a transfer.

3

Send the completed form to NBS via mail or email.

Address: National Benefit Services
PO Box 6980
West Jordan, UT 84084

Email: 125Compliance@NBSbenefits.com

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What's Next?

We'll take it from here.

NBS will send the completed form to your prior provider to initiate the transfer of your balance to Avidia Bank (our custodian partner).

Note: The transfer can take up to 6 weeks (subject to prior custodian's transfer timelines and processes), so be sure to plan for any upcoming expenses accordingly.

If you have not already opened your NBS HSA, you will receive an NBS Benefits Card in the mail after your transfer.

To access your account online, register at:
my.nbsbenefits.com

**For more information,
please call
(800) 274-0503**