

HSA/MSA ROLLOVER FORM
Health Savings Administrators

Instructions: If you are establishing a new account, you must also fill out a Fulton Fund Advantage HSA enrollment form. Use this form when you are transferring money from an existing MSA or HSA account. Upon receipt of the completed form(s) and your rollover check, we will open your account and invest the funds as directed.

Check one: Transfer assets to an existing HSA account number(s)
 Establish a new HSA (HSA Enrollment Form is attached)

**1. NAME
AND
ADDRESS**

| | | |
|------------------------|-----------------------------------|----------------|
| Last Name | First Name | Middle Initial |
| Social Security Number | Telephone No. (Include area code) | |
| Number and Street | | |
| City | State | Zip Code |

**2. COMPLIANCE
WITH IRS
GUIDELINES**

I have been issued a check in the amount of \$_____ and closed my MSA or HSA. I would like to rollover the funds to establish an HSA. It has been 60 days or less since I received the distribution. I have not made any other MSA or HSA rollover contributions in the past 12 months. Initial _____

**3. INSTRUCTIONS
TO FULTON
BANK**

Please invest this in the Fulton Fund Advantage investment option designated on my HSA enrollment form or any subsequent change of investment forms.

4. SIGNATURE

I have read and understand the rollover rules and conditions on this form and I have met the requirements for making a rollover. Due to the important tax consequences of rolling over funds or property to an HSA, I have been advised to see a tax professional. All information provided by me is true and correct and may be relied on by the Trustee or Custodian. I assume full responsibility for this rollover transaction and will not hold the Trustee or Custodian liable for any adverse consequences that may result. I hereby irrevocably designate this contribution and/or property as a rollover contribution.

Thank you for your prompt handling.

| | |
|----------------|------|
| Your Signature | Date |
| Witness | Date |
