

HSA Transfer Request

To Bring Funds to NASA Federal



Use this form only if you have the specified Health Savings Account (HSA) open with NASA Federal Credit Union.
Need to open a HSA? Please contact us for assistance at 1-888-NASA FCU.

PART 1. NASA FCU ACCOUNT HOLDER *Individual requesting the transfer*

Name (First/M.I./Last)		NASA FCU Account Number	
Date of Birth	Social Security Number	Phone	Email

PART 2. CURRENT HSA TRUSTEE OR CUSTODIAN *Tell us about your account at your other institution*

Name of Financial Institution		Account Number	
Address Line 1		Address Line 2	
City/State/ZIP	Phone	Fax Number	

PART 3. TRANSFER INSTRUCTIONS

Transfer Amount Transfer Date

☐ Entire Account Balance ☐ This Transfer Will Close the Current Account

PART 4. SIGNATURES

I authorize the transfer of these assets and certify that all information provided by me is true and accurate. I understand that I am responsible for determining that this transfer qualifies under the rules that apply to such transfers and agree to comply with those rules. I assume responsibility for any consequences that may result from this transfer and I agree that the trustee or custodian is not responsible for any consequences that may arise from executing this transfer request.

The trustee or custodian signing below agrees to accept the assets being transferred.

Signature of Recipient	Date (mm/dd/yyyy)
Notary Public/Signature Guarantee (if required by the trustee or custodian)	Date (mm/dd/yyyy)
Authorized Signature of Accepting Trustee or Custodian	Date (mm/dd/yyyy)

Instructions to Complete Your Request

1. **Complete the form in its entirety and physically sign under Signatures. Please obtain Notary or Signature Guarantee if your current institution requires it to release your funds.**

2. **Return Form by:**

Mail:	Overnight/Expedited:	Standard Mail:
	NASA Federal Credit Union	NASA Federal Credit Union
	Attn: Specialty Accounts	Attn: Specialty Accounts
	500 Prince Georges Blvd	P.O. Box 1588
	Upper Marlboro, MD 20774	Bowie, MD 20717-1588

Online Banking: Log into Online Banking to send a secure message. In the top right, next to profile, click the message icon. Click "compose" then "attach files" option in the message center to attach a copy of the form and photo ID.

Mobile Banking App: Log into the Mobile App to send a secure message. In the bottom right, click "more." Click message center, click "compose" then "attach files" option in the message center to attach a copy of the form and photo ID.

Fax: Specialty Accounts 301-390-4525