



**BenefitWallet  
Transfer INTO BenefitWallet**

**Account Holder Information – Complete and Provide to Current Trustee/Custodian**

**Complete and sign this form. Provide it to your current HSA trustee/custodian to initiate a transfer *into* your BenefitWallet HSA.**

Note: Your account number can be found on account holder statements, checks and deposit slips.

**Current Trustee/Custodian Information:**

Account holder Name (as listed with current trustee/custodian)	
Trustee/Custodian Name	
Address	
City, State Zip	
Account Number	

**Transfer Funds to BenefitWallet**

BenefitWallet Account Number 9 5 0 0

Note: Your account number can be found in the upper right corner of your BenefitWallet Welcome Kit cover letter.

Please transfer 100% of my account balance

Please transfer \$ \_\_\_\_\_

Account Holder Name (print) \_\_\_\_\_

Account Holder Signature \_\_\_\_\_

Date of Signature \_\_\_\_\_

**Trustee/Custodian Instructions – Transfer via Check**

Send this completed form with a trustee/custodian check payable to The Bank of New York Mellon to:

**Mail**  
BenefitWallet  
PO Box 535161  
Pittsburgh, PA 15253-5161

**Courier/Overnight**  
BenefitWallet/HSA Operations  
500 Ross Street Suite 154-0510  
Pittsburgh, PA 15262-0001