

Request to Close Health Savings Account

Complete and return this form to Chase after all outstanding checks written on your Health Savings Account (HSA) have been paid. Once Chase receives your completed form, the account closure process begins, and any HSA checks presented for payment will not be honored. If your employer sends contributions to your HSA, be sure to notify your employer to stop all further contributions. If you have opened an HSA Investment Account, you must contact J.P. Morgan Institutional Investments, Inc. (JPMII) at 866-774-7129 to request liquidation of your investments and closure of the Investment Account prior to returning this form. If your HSA Investment Account has a zero balance, you hereby instruct JPMII to close the Investment Account. The HSA cash account cannot be closed until the investments have been liquidated.

Health Savings Account #: 397 _____

Account Holder Name: _____, _____, _____
(Last) (First) (MI)

Mailing Address:

Street: _____
Apt. #: _____
City: _____ State: _____
Zip Code: _____ - _____

Daytime Telephone #: _____ SS#: _____ - _____ - _____

- Please close my Health Savings Account and disburse the funds as directed below. I understand that Chase will wait 10 days to allow any outstanding debit card transactions to settle before mailing the check for any remaining account balance less any applicable Account Closing fee.

OPTION 1: Trustee-to-Trustee Transfer:

Account holders may instruct Chase to transfer funds from their HSA at Chase to their new HSA at another institution by completing the information below. There is no IRS limit on the number of trustee-to-trustee transfers that can take place in a year.

- Please transfer the funds in my HSA listed above to my new Health Savings Account at the institution listed below. Make the check payable to the new custodial institution and forward it directly to them.

Custodial Institution Name: _____
Institution Address: _____
City: _____ State: _____
Zip Code: _____ - _____
Account #: _____

OPTION 2: Rollover or Direct Distribution to Account Holder:

You may roll over funds from this HSA to an HSA at another institution. If your HSA has check writing capability, we recommend that you write a check for the entire account balance, made payable to your new HSA Custodian. Submit this form to Chase after your new custodian has cashed the check; otherwise the check will bounce because Chase has closed your HSA.

Note: According to the IRS, an account holder may make only one rollover contribution to an HSA during a 1-year period. To qualify as a rollover, any amount paid or distributed from an HSA to an account holder must be paid over to an HSA within 60 days after the date of receipt of the payment or distribution.

- I have written a check on my Health Savings Account, payable to my new HSA custodian, to transfer the funds in my account. (Note: This option is only available if your HSA has check writing capability.)
- Please send me a check for the funds in my account.

For any questions about closing your HSA, please contact HSA Member Services at 866-524-2483. Forward this form to JPMorgan Chase Bank, N.A., HSA Operations, P.O. Box 30207, Tampa, FL 33630-3207.

Account Holder's Signature _____ Date: _____