

Consolidating your HSAs with Forma

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Why should I consolidate my HSAs?

As a Forma HSA account holder in 2023, you can manage **all of your HSA funds**, including any funds remaining from previous HSAs, in a single platform with Forma.

You'll be able to quickly upload receipts, check on your investments and make any adjustments as needed. Plus, you can use your Forma HSA Debit Card to spend your pretax money directly on medical expenses.

And it gets even better.

With Forma, you earn 0.15% APY on your HSA cash balance — that's 3x the national average!

How do I consolidate my funds?

To consolidate your HSA funds in Forma, you will need to complete what is called an **Individual Transfer**, which we will walk you through on the following page.

Before you start:

Some custodians may charge a one-time closure fee or have specific instructions for transfers, so we suggest reaching out to them before you begin.



Transferring your funds

Transferring your HSA funds from another custodian to Forma is easy!

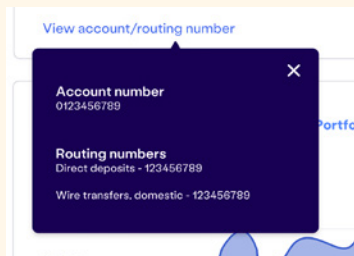
Step 1:

Download the [Individual Transfer Form](#).

Step 2:

Complete the entire form, including your Forma HSA account numbers

You can find your Forma HSA account and routing numbers by logging into the member portal.



Step 3:

Send the completed form to your previous HSA custodian.

If your custodian is Alegeus, mail the form to:
WealthCare Saver
PO BOX 162177
Altamonte Springs, FL 32716

If you have a different custodian or are unsure, reach out to your internal HR/Benefits team for current HSA custodian details

That's all you need to do on your end! After you send in the completed form your previous custodian will work with us to transfer the balance.

FAQ's:

Who is my current custodian?

If you're not sure who your HSA's current custodian is, reach out to your Benefits or Human Resources department for more information.

What happens next?

1. Your previous HSA custodian will probably put a 7-10 day hold on your HSA while they're transferring your money.
2. During the hold you'll lose access to your previous HSA, but can continue to use your Forma HSA.
3. You can expect the HSA balance transfer to finish in 2 business weeks.

Need further assistance?

If you have any questions you can always reach out to the Forma Support Team at support@joinforma.com.

