



# TRANSFER OF ASSETS ONLINE FORM INSTRUCTIONS

Transferring assets into a Fidelity HSA® is a 5 step process and should take about 3 minutes to complete the online form. Once the Transfer of Assets form has been received by Fidelity, it will take approximately 2 - 4 weeks to complete the HSA fund transfer.

Before you begin the steps below you will need to print a copy of your HSA statement from your current provider to attach to your Transfer of Asset (TOA) form. The statement should contain the account number you will enter in step 3.

Don't have have a Fidelity HSA yet? Open one at [www.netbenefits.com](http://www.netbenefits.com) before completing the TOA process.



Go online to [www.fidelity.com/toa](http://www.fidelity.com/toa) and select "Transfer Assets"

The screenshot shows the Fidelity website interface. At the top, there is a green navigation bar with the Fidelity logo and links for Customer Service, Open an Account, Refer a Friend, and Log Out. Below this is a search bar and a secondary navigation bar with links for Accounts & Trade, Planning & Advice, News & Research, Investment Products, and Why Fidelity. The main content area is titled "Transfer an Account to Fidelity" and includes a sub-header "Move your account from another firm quickly and efficiently. We'll help you every step of the way." Below this, there is a section "What you'll need" with two bullet points: "A statement from your current firm" and "A matching account." A blue button labeled "Transfer Assets" is prominently displayed. Below the button, it states "The transfer will take about five days to process, and you can monitor the status with our Transfer Tracker." There are also links for "Frequently asked questions" and "Other account transfer options" and "Other ways to move money". On the right side of the page, there is a sidebar with "Questions? 800-396-8982", "Find an Investor Center", "Want to have us call you now?", "Transfer assets by mail (PDF)", and "Need help?".

For illustrative purposes only



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**Log into your HSA account.**

You must have an account to continue

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**Complete the online form.** You'll be required to enter the following information:

**From:**

- Your prior HSA provider
- Your prior HSA provider account number
- Select 'Account Type' = "Health Savings Account"

**To:**

- Choose your Fidelity HSA Account

**Transfer Type:**

- Choose "Transfer entire cash amount"
- Important Note: The assets within your current HSA provider should all be in cash in order for the transfer to take place. If you have any HSA assets invested Fidelity will not proceed with the transfer.*

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**Once complete select "Next" button at the bottom of the page.**



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**Review the information for accuracy on the next page, if required, make the appropriate adjustments.**

**If everything looks accurate, select the "Next" button at the bottom of the page.**

**Fidelity** Transfer Assets

## Review Your Information

Please look this information over carefully and correct any errors before hitting the Next button.

**Transfer Details** | [Edit](#)

From	Optum Bank (hsa)
Account Number	123456
Account Type	Health Savings Account
To	[HEALTH SAVINGS ACCOUNT]
Transfer Type	Bank Transfer

[Save & Finish Later](#) [Previous](#) [Next](#)

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**Fidelity** INVESTMENTS

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**Questions?**  
**800-396-8982**  
[Find an Investor Center](#) [Click to Talk - We'll call you](#)

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Print the prefilled transfer request form, sign and date section 5, and send to one of the addresses listed below that section. Be sure to include a copy of your HSA statement from the provider you are transferring assets from.

**Fidelity** Transfer Assets

## You're Almost Done!

**Your Request Has Not Yet Been Completed**

You need to take care of a few last steps to submit your transfer request.

[Print your prefilled transfer request. \(PDF\)](#)

If you are satisfied the information is correct, please sign where indicated.

Attach your most recent statement to your transfer request.

Mail the signed transfer request and a copy of your most recent statement to the Fidelity address provided on the transfer request form. (Note: Do not mail paperwork directly to Optum Bank (hsa).)

You may check the status of your transfer at any time.

[Go to Transfer Tracker.](#)

**Estimated Date of Completion(Once Application Is Received): 11 Business Days**

[+ Transfer details](#)

**Next Steps**

[Return to your Fidelity.com home page.](#)

[Sign up for alerts.](#)

[Start a new transfer.](#)

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**Fidelity** INVESTMENTS

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**Questions?**  
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If you have any questions or would like to track the status of your transfer, you can do so by going to the following address: <https://scs.fidelity.com/customeronly/s-statustoa.shtml>. You should expect the transfer to be completed within 2 - 4 weeks of the form being received by Fidelity. If there are any questions, please don't hesitate to call us at **800-396-8982**.