Fidelity Transfer of Assets QRG

Please follow instructions below to complete the Fidelity Transfer of Assets form if you did not complete the econsent with HSABank. For you convenience, we have prefilled some of the information.

If you have any questions, please call Fidelity at:
1-800-835-5087
1-800-587-5282 - español

Transfer of Assets

1. Fidelity Account Information

Account Number	☐ New Fidelity account *Attach a completed new account application.*

Account Owner/Trust/Entity Name

Social Security Number/Taxpayer ID Number

Additional Account Owner/Trust/Entity Name
N/A

Social Security Number/Taxpayer ID Number

Log into NetBenefits.com (or the app) or Open You Account on Netbenefits.com (or the app) or call Fidelity Customer Service to get your account number.

2. Account Being Transferred

Account Number

Account Owner/Trust/Entity Name(s)

Transferring Firm Name
HSA BANK

Transferring Firm Address	City
P.O. BOX 939	SHEBOYGAN

State/Province	ZIP Code	Delivering Firm Phone
WI	53082-09393	8 0 0 3 5 7 6 2 4 6

Transferring Firm Account Type *Check one.*

Log into mycigna.com (or the app through 12-31-23), call Cigna Customer Service or call HSABank to get your account number.

Cigna: 855-566-4295
HSABank:

After 12-31-23
Call HSABank to get your account number.

(800) 357-6246
Spanish: (866) 357-6232

4. Signatures and Dates *All owners of both accounts must sign this form.*

By signing below you:

- Direct Fidelity and the delivering firm to act on all instructions given on this form, including transferring assets to Fidelity.
- Accept that any assets not readily transferable might not be transferred within the time frames set by FINRA or other applicable authorities.
- Authorize the delivering firm to sell any nontransferable money fund shares and any shares of other mutual funds that you have requested be sold, and transfer the proceeds as cash.
- Accept that Fidelity is not responsible for changes in the value of assets that may occur during the transfer process.
- Affirm that you are aware of any tax or financial implications that may arise in connection with this transfer or with the sale or liquidation of any assets prior to transfer, including penalties, fees, financial losses, or losses of product features or benefits.
- Authorize the delivering firm to contact you about any assets that cannot be transferred.
- Authorize the delivering firm to deduct from your account any fees that you owe, and, if necessary, to sell assets in your account to pay those fees.
- Instruct the delivering firm to transfer any physical certificates in good deliverable form, including any necessary tax waivers.
- Authorize the delivering firm to cancel any open orders on your account when it receives this form.
- Affirm that you have destroyed or returned any credit/debit cards and unused checks associated with your account at the delivering firm, if closing that account.
- Accept that you may be charged short interest fees to maintain short positions that you transfer to Fidelity.

All retirement accounts

- Affirm, if you are of the applicable requirement minimum distribution (RMD) age, that this transfer will not violate IRS rules for RMDs.

SIMPLE IRAs

- Accept that the Date of First Participation will be the date that contributions are first deposited to your SIMPLE IRA at Fidelity by your employer, unless you provide a Date of First Participation.

Differences in owner name(s) or account type

- Acknowledge the existence of any differences in the owner name(s) or account type between Section 1 and Section 2.

ALL owners of BOTH accounts must sign and date. If an owner's name appears differently on different accounts, that owner must sign both ways. Ask Fidelity or your current firm if you need a Medallion signature guarantee (available from most banks, credit unions, and other financial institutions). If you do, provide one for each owner. A notary seal/stamp is NOT a Medallion signature guarantee.

PRINT OWNER NAME *First, M.I., Last*

MEDALLION SIGNATURE GUARANTEE

OWNER SIGNATURE — **Today's Date** *MM/DD/YYYY*

SIGN X X

PRINT OWNER NAME *First, M.I., Last*

MEDALLION SIGNATURE GUARANTEE

OWNER SIGNATURE — **Today's Date** *MM/DD/YYYY*

SIGN X X

Sign, date and return completed form to Fidelity Investments via mail.

u print and sign the form? Send the form and a copy r non-Fidelity account statement to Fidelity.

ions? Go to *Fidelity.com/toa* or call 800-396-8982.

er and track the progress of your transfer at *Fidelity.com/toa*.

Regular mail
Fidelity Investments
Attention: TOA
PO Box 770001
Cincinnati, OH 45277-0035

Overnight mail
Fidelity Investments
Attention: TOA
100 Crosby Parkway
Mailzone: KC1A
Covington, KY 41015