

# Health Savings Account Change Form



Use this form to change your current Everence HSA. There are two options: Investment HSA and Standard HSA. **Please complete and fax this form to (574) 537-3627 or email it to [member.services@everence.com](mailto:member.services@everence.com).** You may also mail this form to Everence HSA Administration, P.O. Box 483, Goshen, IN 46527. If you have questions about changing your account, you may call us at (800) 348-7468 ext. 2460, or email [hsaservice@everence.com](mailto:hsaservice@everence.com).

HSA Owner name \_\_\_\_\_

HSA number \_\_\_\_\_

Please check one of the two options below.

**Option 1:**

**Change my Standard HSA to an Investment\* HSA:**

I hereby request Everence Federal Credit Union to change my current Standard HSA to an Investment HSA. I understand that a \$3 monthly administration fee will be deducted from my Investment HSA. The Investment HSA is a transactional credit union account that allows you to designate some of the money in that account to investing. You'll have the opportunity to consider the long term while having money on hand for current health expenses.

**Option 2:**

**Change my Investment HSA to a Standard HSA:**

I hereby request Everence Federal Credit Union to change my current Investment HSA to a Standard HSA. I understand that I am instructing Everence to liquidate all HSA investments that I may have. The proceeds will be deposited in my HSA share account two business days following the investment trading day.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

*\*When investing, you should consider the investment objectives, risks, and the charges and expenses of each mutual fund carefully before investing. This and other information about the Funds is in the prospectus, which can be obtained at your local Everence Federal Credit Union branch or by calling (800) 348-7468 ext. 2460. Read the prospectus carefully before you invest.*

*\*Investment products offered are not NCUA/NCUSIF/FDIC or otherwise insured; are not obligations of the credit union; are not guaranteed by the credit union, Everence Trust Company, or Everence Insurance Company; and involve investment risks, including possible loss of principal.*

Everence Federal Credit Union and Everence Insurance Company are not authorized to provide tax, investment, or legal advice with respect to health savings accounts. Please refer questions to your tax advisor, investment advisor, or accountant.

**Everence Federal Credit Union**

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