

Everence HSA Investment Liquidation Request



This form should be used to request liquidation of your Everence HSA investments. Please complete and fax this form to (574) 537-3627 or mail it to Everence HSA Administration, P.O. Box 483, Goshen, IN 46527. For questions about HSA investment transactions, please call (800) 348-7468 ext. 2460, or email hsaservice@everence.com.

Account owner information

Name _____ HSA account number _____

Liquidation of HSA Investments

You may request a full or partial liquidation of your investments. The proceeds will be deposited into your Everence HSA share account. Selecting 100 percent in the fixed percentage fund column(s) will result in a full liquidation of the fund(s). Partial liquidations by dollar amount may not exceed 75 percent of your current assets in a given mutual fund. If you request a dollar amount that is more than 75 percent of the current assets in a given fund at the time of liquidation, your request will be changed to an amount equal to 75 percent of the assets in that fund. If this happens, the amount deposited in your HSA share account may be different than what you requested due to market fluctuations. Liquidation by fixed percentage will be based on the value of the investments as of the investment trading day.

Amount to liquidate

Enter the **dollar amount or percentage** of your HSA investments you wish to liquidate.

	Fixed dollar amount	Fixed percentage
Praxis Genesis Portfolios		
Conservative A	\$ _____	_____ %
Balanced A	\$ _____	_____ %
Growth A	\$ _____	_____ %
Praxis Impact Bond Fund A (formerly Praxis Intermediate Income Fund)	\$ _____	_____ %
Praxis Value Index Fund A	\$ _____	_____ %
Praxis Growth Index Fund A	\$ _____	_____ %
Praxis International Index Fund A	\$ _____	_____ %

Investment trading occurs each Tuesday or the next business day in the event of a holiday. This liquidation request must be received by 12 p.m. (noon) on the day prior to the investment trading day. Liquidation requests received after this time will not be processed until the next investment trading day. Investment liquidations will be processed at the market price of the mutual fund at market close on the investment trading day. Proceeds are available for withdrawal from your HSA share account two business days following the investment trading day.

Investment threshold

If you request a liquidation amount that increases your HSA share account balance to an amount higher than your investment threshold, some of your liquidated funds may be automatically reinvested into your HSA investments the following week. To help prevent this from happening, we may automatically raise your investment threshold. You will be notified if this occurs.

Authorization

I hereby authorize this investment liquidation in the Everence HSA indicated on this form. I certify that all information provided by me is true and accurate, and I agree to submit additional information if requested. All decisions regarding this investment liquidation are my own. I expressly assume the responsibility for any adverse consequences which may arise from this liquidation. I indemnify Everence Federal Credit Union and Everence Insurance Company, their agents, successors, and affiliates from any and all claims I may have or hereafter claim to have with respect to this liquidation.

Signature of account owner _____

Date _____

Everence Federal Credit Union

1110 N. Main St.
P.O. Box 483
Goshen, IN 46527
everence.com

Toll-free: (800) 348-7468
T: (574) 533-9511

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Mutual funds offered are not NCUA/NCUSIF/FDIC or otherwise insured; are not obligations of the credit union, Everence Trust Company or Everence Insurance Company; are not guaranteed by the credit union; 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.