



Custodial Transfer Form

Use this form to transfer any HSA funds from an external custodian into your Avidia Bank HSA. Once your form is received, we will initiate the Trustee Transfer on your behalf. Please note: HSA Transfers may take 4-6 weeks to complete depending on the transferring Custodian or Trustee's processing time.

Instructions: Complete and return this form to us by secure link or mail:

Upload completed form to:

Avidia Secure File Portal

Mail completed form to:

Avidia Bank, P.O. Box 370,
Hudson MA 01749

Questions about this form?

1.855.248.6311

Account Holder's Personal Information:

First Name		MI		Last Name		
Street Address					Apt #	
City			State		Zip	
Social Security #	-	-	Daytime Phone #			
Email Address						
Avidia Bank Account #						

Transfer Instructions:

Transfer the entire balance of the current HSA listed below to Avidia Bank and CLOSE my account and liquidate investments, if applicable.

Please Transfer \$_____ of the current HSA listed below to Avidia Bank and **DO NOT CLOSE** my account.

Make Check Payable to: Avidia Bank as Custodian for: _____
Account Owner's first and last name

Transfer Information:

Current Custodian Bank Name:						Current HSA Account #:		
Street Address								
City			State		Zip			
Phone #			Fax #					

Instructions for Custodian:

Mail the Transfer Check to Avidia Bank; P.O. Box 370, Hudson, MA 01749

Account Holders Authorization:

I authorize the transfer of the HSA assets in the manner described above and certify that all of the information provided by me is correct and may be relied upon by the Custodian. I understand that I am responsible for determining that this HSA transfer qualifies under the rules and conditions applicable to such transfers and agree to abide by those rules and conditions. I assume responsibility for any tax consequences or penalties that may apply to the transfer of these assets and I agree that the Custodian shall in no way be held responsible.

X _____
Account Owner Signature Date

Accepting HSA Custodian:

Avidia Bank agrees to serve as the new Custodian for the account of the individual who is authorizing the transfer. As the newly designated Custodian, we agree to accept the aforementioned assets transferred. Please remit a check payable to Avidia Bank as Custodian of the HSA Account Number listed above for the amount listed in the Transfer Instructions.

X Mary Newton
Authorized Signature of New Custodian Date

Rev. 03/2023



The balance in your HSA is insured by the Federal Deposit Insurance Corporation (FDIC), and subject to applicable deposit limits.

