

Authorization to Transfer and Close HSA

I hereby authorize and direct HealthEquity, Inc. (“HealthEquity”), the custodian of my HealthEquity health savings account (“HealthEquity HSA”), to close my HealthEquity HSA on 1/22/2020 and transfer 100% of my HSA cash balance to Fidelity. By clicking the “I Agree” button below, I am signing this agreement on such date (as if I had affixed my handwritten signature) and I acknowledge and agree that:

- My HealthEquity HSA will be closed on the date indicated above, and I will not be able to make contributions to or distributions from my HealthEquity HSA on or after that date.
- This election is irrevocable upon receipt by HealthEquity.
- My HealthEquity HSA cash balance will be transferred to Fidelity, provided that it is opened and in good order on or prior to 1/22/2020.
- If a portion of my HealthEquity HSA is currently invested, I must liquidate those investments and return the proceeds to my cash balance on or before 1/14/2020 in order for my HealthEquity HSA to be transferred to my Fidelity HSA. **If I do not liquidate my investments timely, I acknowledge that HealthEquity will not process this request.**
- The transition period will begin on 1/14/2020 and end on 1/24/2020. Access to my HealthEquity HSA records and funds will be suspended (including cancellation of my debit card) on 1/14/2020. I may access my HealthEquity HSA records again on 1/22/2020. Money transferred to Fidelity will not be available in my Fidelity HSA until 1/24/2020.
- If residual funds are returned to HealthEquity within 60 days after my HealthEquity HSA closure, my HealthEquity HSA may be temporarily reopened for recordkeeping purposes and then closed again in accordance with the instructions provided herein (no additional fee will apply).
- I will continue to have access to my HealthEquity HSA records online for at least six (6) years following closure, after which time such records may no longer be available to me.
- I absolve HealthEquity of all liability in connection with this authorization and instruction. HealthEquity shall not be liable for any delay, loss, claim, taxes, lost opportunity or other diminution in value which results from this direction, or that may occur from their inability to process this request.

If I do not wish to transfer my HealthEquity HSA to Fidelity, or if I do not have a HealthEquity HSA, I must select the “I Disagree” button below. If I elect not to transfer my HealthEquity HSA or my HSA otherwise remains at HealthEquity (for example, because I do not liquidate investments or open an Fidelity HSA prior to the transfer), I assume responsibility for all account fees, including monthly administration fee, which will be deducted from the balance of my HealthEquity HSA on a monthly basis and any future account closure fee charged by HealthEquity.

I Agree **I Disagree** (or do not have a HealthEquity HSA)