



# Transferring Your Health Savings Account (HSA)

Consolidating your accounts made easy.

## Why Transfer My HSA?

If you have more than one HSA, consolidating your funds under one account is a good option to consider. TML MultiState Intergovernmental Employee Benefits Pool (IEBP) is upgrading and providing integration between the Alegeus Section 125 Debit Card vendor with your Liberty Health HSA Bank. This upgraded integrated service should expedite access to HSA Employer and Employee monthly deposits.

- **A single experience.** With your funds in one Liberty Health HSA Bank, you will have one login, one statement, one mobile app, one support team, and one debit card.
- **Save money by reducing fees.** By consolidating funds and closing your other account(s), you can eliminate any administration fees from your prior custodian.
- **Make tax-time easier.** By having one HSA account, you will only have one set of tax forms to manage during tax-time.

## How to Transfer My HSA?



**Download** the HSA Transfer Form at [www.iebp.org](http://www.iebp.org)

**Complete** and sign the HSA Transfer Form

**Submit** the form to:  
TML MultiState IEBP  
PO Box 140167 | Austin, TX 78714-0167

## What's Next?

IEBP, Alegeus, and Liberty Health HSA Bank will take care of the rest. We will work with HSA Bank to transfer your balance to your Liberty Health HSA Bank. The transferred funds will appear in your Liberty Health HSA Bank account at the end of the Blackout Period.

### Bulk Transfer and Blackout Period Dates

Anniversary Plan Year Month	IEBP Transfer Form Due Date	HSA Bank Account Closed	HSA Bank Transfer Money to Liberty Health HSA Bank	Blackout Period
<b>Plan Year Oct. 1<sup>st</sup></b> Oct. 1 <sup>st</sup> thereafter, deposits will go to Liberty Health HSA Bank	Oct. 20, 2017	Dec. 12, 2017	Dec. 14, 2017	Nov. 22, 2017 - Dec. 14, 2017
<b>Plan Year Jan. 1<sup>st</sup></b> Jan. 1 <sup>st</sup> thereafter, deposits will go to Liberty	Jan. 19, 2018	Mar. 13, 2018	Mar. 14, 2018	Feb. 21, 2018 - Mar. 14, 2018
<b>Plan Year Mar. 1<sup>st</sup></b> Jan. 1 <sup>st</sup> thereafter, deposits will go to Liberty	Jan. 19, 2018	Mar. 13, 2018	Mar. 14, 2018	Feb. 21, 2018 - Mar. 14, 2018
<b>Plan Year May 1<sup>st</sup></b> Jan. 1 <sup>st</sup> thereafter, deposits will go to Liberty	Jan. 19, 2018	Mar. 13, 2018	Mar. 14, 2018	Feb. 21, 2018 - Mar. 14, 2018
<b>Plan Year July 1<sup>st</sup></b> Jan. 1 <sup>st</sup> thereafter, deposits will go to Liberty	Jan. 19, 2018	Mar. 13, 2018	Mar. 14, 2018	Feb. 21, 2018 - Mar. 14, 2018

Questions? | Call us at (800) 282-5385