



HOW TO TRANSFER YOUR EXISTING HSA TO CME FCU

OPEN CME HSA ACCOUNT

- Your CME Health Savings Account must be opened before beginning the transfer process.

COMPLETE THE HSA TRANSFER FORM PROVIDED BY CME FCU

- Complete the highlighted sections, then print and sign the form.

COMPLETED FORM WILL NEED TO BE SUBMITTED TO THE CURRENT HEALTH SAVINGS ACCOUNT TRUSTEE/CUSTODIAN

- There are several processing options, and we can customize the method to meet your organization's needs.

ONCE THE FORM IS SUBMITTED, THE TIMING OF THE TRANSFER IS DEPENDENT ON THE FORMER TRUSTEE/CUSTODIAN.

- After processing, we can provide a more accurate timeframe for future requests.

QUESTIONS? **HSA@CMEFCU.ORG**