AVIDIA HEALTH

Custodial Transfer Form

Use this form to transfer 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

Section 1: 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 #					

Section 2: Transfer Information

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

Section 3: Transfer Instructions

☐ Transfer Entire account balance

Transfer Specific Dollar Amount $_____

Close Account

Section 4: Instructions for Custodian

Make check payable to "Avidia Bank For The Benefit of [Owner's Name]" and mail check, along with this fully completed form to: Avidia Bank, PO Box 370, Hudson, MA, 01749. For proper credit, please include the last four digits of the account holder's social security number and their ten digit Avidia HSA account number.

Section 5: Account Holder's 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.

X_____ _____
Authorized Signature of New Custodian Date

Rev. 02/2025

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

AvidiaBank