

HSA Transfer Request Form

If you currently have a Health Savings Account (HSA) with WageWorks / BNY Mellon and wish to transfer all of your funds directly to DataPath / HSA Today, please complete the below form and click Submit.

Current Custodian: WageWorks / BNY Mellon

WageWorks Phone/Fax: 877-924-3967

WageWorks Address: P.O. Box 9813, Providence, RI 02940-8013

First Name:

Last Name:

Social Security Number:

DOB (mm/dd/yy):

Street Address:

City:

State:

Zip:

Phone Number:

Email Address:

By checking the box below, you agree that your Name as typed above serves as your electronic signature and is intended to authenticate this transfer and to have the same force and effect as your manual signature. By your electronic signature, you authorize DataPath, Inc. to complete this one-time account transfer.

I authorize the transfer of all my HSA assets from WageWorks / BNY Mellon to DataPath / National Advisors Trust Company, FSB.

Recent Tweets

 Capital Content @CapitalContent

RT @OneExchange: 10 reasons why a #HSA may be a smart move for you, ow.ly/SMi4306WAFr @DataPath_Inc #benefits #employeebenefits #HR

1:27 pm · December 14, 2016

Announcements

- HSA Today Enhanced with ZandyHealth and WiserHealth Partnerships October 5, 2016
- DataPath Discontinues Legacy Account Portal October 3, 2016
- Updated link for National Advisors Trust January 1, 2015
- New mySourceCard Video Posted January 1, 2015

Recent News

- FSA vs HRA vs HSA – What are the Differences? December 22, 2016
- Portability and 9 Other Important Things to Know About an HSA December 7, 2016
- HSA Enrollment May Surge During Trump Administration November 16, 2016
- IRS Increases FSA Contribution Limit for 2017 November 1, 2016
- CDH Accounts Can Help Take the Scare Out of Halloween Injuries October 31, 2016