



THE HARRISON GROUP, INC.

# Health Savings Account Death Distribution Form

Use this form to authorize a distribution of assets from a deceased account holder's HSA. If you have any questions about HSAs or completing this form, please contact our customer service team at (855) 222-5727.

**Process:**

1. Complete all sections of this form.
2. **Attach a notarized copy of the death certificate** and any other documentation as requested below.
3. Refer to IRS publication 969 for more information regarding the death of an HSA account holder. <https://www.irs.gov/forms-pubs/about-publication-969>
4. Email, mail or fax completed form and documentation to:  
**Email: [service@theharrisingrouponline.com](mailto:service@theharrisingrouponline.com)**  
**Address: The Harrison Group, Inc., 3 Raymond Drive, Havertown PA 19083**  
**Fax: (610) 853-9079**

\*Required Fields

Part I HSA Deceased Account Holder Information	
*Name (First, MI, Last)	
*Birth Date (MM/DD/YYYY)	*Social Security Number

\*Required Fields

Part II Beneficiary Information (Beneficiary completes this section with his/her information)		
* Name (First, MI, Last)	*Beneficiary Type	
*SSN	<input type="checkbox"/> Spouse <input type="checkbox"/> Non-Spouse Beneficiary  <input type="checkbox"/> Estate (see below for documentation requirements)	
*Address		
*City	*State	*Zip
*Email	* Day Phone #	

Part III Processing Options (choose one – cont'd. on following page)
<p><b>I am the non-spouse beneficiary listed on the HSA requesting The Harrison Group, Inc. to close the HSA and send a check.</b></p> <p><input type="checkbox"/> By completing this section, I understand that any amounts I receive will need to be included in my gross income, except for any funds used to pay for medical expenses incurred by the deceased HSA Account Holder (and paid by me within one year of the Account Holder's death). The check will be made payable to the listed beneficiary and sent to the beneficiary's address.</p>



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**I am the surviving spouse beneficiary and direct The Harrison Group, Inc. to:**

- Open a new HSA account for me. *Please complete and submit the Enrollment Form along with this Form.*
- Transfer the funds to my existing HSA at The Harrison Group, Inc.
- Transfer the funds to my HSA at a different HSA provider. *Please send a completed Transfer Form from your existing HSA custodian along with this request.*
- Close the HSA and send me a check. *Note that IRS taxes and penalties may apply if not used for qualified medical expenses.*

**I am the executor of the Estate of the Decedent and direct The Harrison Group, Inc. to:**

- Close the HSA and send a check. *Include proof of your authority to act with regard to the HSA (for example, letters of testamentary, court appointment, small estate affidavit, etc.) along with the death certificate. The check will be made payable to the estate and sent to the requestor.*

## Rules, Conditions & Signature

I certify that all information is true and correct and may be relied upon by The Harrison Group, Inc. I understand if the HSA includes invested assets, these funds will be liquidated and distributed as cash. Due to the important tax consequences relating to the death of an HSA Account Holder, I have been advised to see a tax professional. State tax laws may vary, and I agree that The Harrison Group, Inc. any representation as to the tax effect of this distribution under state or federal law. I assume full responsibility for this transaction and will not hold The Harrison Group, Inc. liable for any adverse consequences that may result.

I am the individual authorized to execute this transaction. I have read and understand the instructions, rules and conditions relating to this transaction.

\*Signature of HSA Beneficiary

\*Date