

# HSA DISTRIBUTION REQUEST FORM



Use the **HSA Distribution Request Form** for all requests for a distribution from the HSA. If you have any questions regarding this form, please call Shareholder Services at 1-800-238-7701.

**PART I: HSA OWNER INFORMATION (\*DENOTES REQUIRED INFORMATION)**

Name\* (First, M.I., Last) \_\_\_\_\_ Date of Birth\* \_\_\_\_\_ Social Security Number\* \_\_\_\_\_

Street Address (Physical Address)\* \_\_\_\_\_ Apartment # \_\_\_\_\_ City\* \_\_\_\_\_ State\* \_\_\_\_\_ Zip Code\* \_\_\_\_\_

Daytime Phone\* \_\_\_\_\_ HSA Account/Plan Number\* \_\_\_\_\_

**PART II: DISTRIBUTION INFORMATION**

Person/Entity Requesting Distribution:	Distribution Reason:
<input type="checkbox"/> HSA Owner	<input type="checkbox"/> Normal
<input type="checkbox"/> Authorized Signer: _____	<input type="checkbox"/> Disability
<input type="checkbox"/> Beneficiary: _____	<input type="checkbox"/> Death
Tax ID Number: : _____	<input type="checkbox"/> Prohibited Transaction
DO B: _____	<input type="checkbox"/> Transfer
Address: _____	<input type="checkbox"/> to another HSA of owner <input type="checkbox"/> to HSA of ex-spouse
Relationship to HSA Owner: <input type="checkbox"/> Spouse Beneficiary <input type="checkbox"/> Nonspouse <input type="checkbox"/> Estate	<input type="checkbox"/> Return of Excess Contribution In what year was the contribution made?: <input type="checkbox"/> Current <input type="checkbox"/> Prior Year
Year of Death: _____	Excess Contribution Amount: \$ _____ Earnings Attributable to Excess: \$ _____

**PART III: DISTRIBUTION INSTRUCTIONS**

Amount:  \$ \_\_\_\_\_  Entire HSA  
Frequency:  Single Distribution  Monthly  Quarterly  Semi-Annual  Annual Beginning Date: \_\_\_\_\_

Name of Investment	Withdrawal Amount or %
1. Archer Balanced Fund	\$ _____ or _____ %

**PART IV: PAYMENT INSTRUCTIONS**

\*\* Denotes that a **New Technology Medallion Signature Guarantee Stamp** is required.

**By Mail**

- Mail check(s) to the address of record
- Make check(s) payable to someone other than the account owner (Indicate payee below)\*\*

Make check payable to: \_\_\_\_\_

- Mail check to an address other than the one on the account (Provide address below)\*\*

Street Address (Physical Address)\*      Apartment #      City\*      State\*      Zip Code\*

**Send to My Bank**

Send distributions to my bank by Automated Clearing House (ACH) based on the:

- ACH instructions already established for my IRA      **OR**       Bank Account Information below \*\*

Wire transfer my One Time Distribution (not available for Systematic Distributions) to my bank based on the:

- Bank instructions already established for my IRA      **OR**       Bank Account Information below \*\*

**PART V: PAYMENT METHOD**

I authorize the Custodian to withdraw money from my mutual fund IRA and deposit to my bank account. I understand this privilege will be effective after the verification process.

- Attach a voided check for your bank account.**

Account Type:  Checking       Savings

John and Jane Doe 123 Any Street Anytown, USA 12345	Date _____	1003
PAY TO THE ORDER OF _____	Tape your voided check or preprinted deposit slip here.  Please do <u>not</u> use staples.	_____ \$ _____ DOLLARS
BANK NAME BANK ADDRESS		
MEMO _____		

**PART V: PAYMENT METHOD-CONTINUED**

Enter your checking or savings account information:

Name: \_\_\_\_\_

Name of Bank: \_\_\_\_\_

Bank's Phone Number: \_\_\_\_\_

Bank Address: \_\_\_\_\_

ABA Routing Number: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Name(s) on Bank Account: \_\_\_\_\_

Bank Account Number: \_\_\_\_\_

*\*\* Shareholder Services transfers your assets two business days before the date on which you want them credited to your bank account. On the first day, we initiate a withdrawal from your IRA account. On the second day, we instruct the Custodian to transfer the appropriate assets to the Automated Clearing House (ACH). The ACH then transfers the assets to your bank. On the third day, the assets are credited to your bank account.*

**PART VI: ACKNOWLEDGEMENT AND NEW TECHNOLOGY MEDALLION SIGNATURE GUARANTEE**

By signing this HSA Distribution Request Form, I certify that the information I have provided is true and correct. I understand that I am solely responsible for ensuring I am eligible to authorize this distribution, and I assume all responsibilities for any consequences as a result of my actions. I have been advised to seek competent legal and tax advice and have not been provided any such advice from the Trustee/Custodian. I will indemnify and hold the Trustee/Custodian harmless from any consequences related to executing my instructions, including payments made in error.

Signature of HSA Owner (or authorized signer): X \_\_\_\_\_ Date: \_\_\_\_\_

Signature of HSA Trustee/Custodian Representative: X \_\_\_\_\_ Date: \_\_\_\_\_

**A New Technology Medallion Signature Guarantee Stamp is designed to protect the account from fraud.**

The following institutions are acceptable signature guarantors:

- Participants in good standing of the Securities Transfer Agents Medallion Program ("STAMP")
- Commercial banks which are members of the Federal Deposit Insurance Corporation ("FDIC")
- Trust Companies
- Firms which are members of a domestic stock exchange
- Eligible guarantor institutions qualifying under Rule 17Ad-15 of the Securities Exchange Act of 1934, as amended, that are authorized by charger to provide new technology medallion signature guarantee stamps (e.g., credit unions, securities dealers and brokers, clearing agencies and national securities exchanges)
- Foreign branches of any of the above

**Note:** The Transfer Agent cannot honor guarantees from notaries public, savings and loan associations, or saving banks.



**MAILING INSTRUCTIONS**

Please send completed form to:

***Regular Mail Delivery***  
 Archer Balanced Fund  
 Mutual Shareholder Services  
 8000 Town Centre Drive, Suite 400  
 Broadview Heights, OH 44147

***Overnight Delivery***  
 Archer Balanced Fund  
 Mutual Shareholder Services  
 8000 Town Centre Drive, Suite 400  
 Broadview Heights, OH 44147