

HEALTH SAVINGS INVESTMENT ACCOUNT TRANSFER FORM



Important Note – Use this form for making ongoing transfers between your Health Savings Checking Account and Health Savings Investment Account - Do not use this form to set up a new Health Savings Investment Account. Use the "Health Savings Investment Account – Initial Enrollment Form" for establishing your new account.

I. CUSTOMER INFORMATION

Name: _____ Last four digits of Social Security No.: _____
Address: _____ Date of birth: _____
City, State, Zip: _____
Email address: _____ Daytime phone: _____

II. TRANSFER FROM HEALTH SAVINGS INVESTMENT ACCOUNT TO HEALTH SAVINGS CHECKING ACCOUNT*

I direct that _____ dollars (\$500.00 minimum) be transferred from my Health Savings Investment Account to my Health Savings Checking Account Number _____; **OR**
I direct that my entire Health Savings Investment Account balance be transferred to my Health Savings Checking Account Number _____.

III. TRANSFER FROM HEALTH SAVINGS CHECKING ACCOUNT TO HEALTH SAVINGS INVESTMENT ACCOUNT

I direct that _____ dollars (\$500.00 minimum) be transferred from Health Savings Checking Account Number: _____ to my Health Savings Investment Account.

IV. APPROVAL SIGNATURE

Signature

Date

Please sign this form and return to Associated Bank by either:

- Faxing to Associated Bank at 920-727-5312
- Mailing to Associated Bank, Attn: HSA/RPS Support, P.O. Box 1007, Neenah, WI 54957-1007 Mail Stop 7116
- Emailing to Associated Bank. Please contact Customer Care at 800-431-4649 and request a secure email. If this is the first secure email from Associated Bank, open the attachment and register as a new user. Once registered, open the attachment and reply, attaching your form.

To make transfers via telephone please call 800-431-4649.

Please note that transfers between checking and investment accounts may take up to three business days to complete.

Statements are generated quarterly and provided electronically or by mail. You will receive an email as soon as your monthly statement is available online.

Investors should read the Prospectus carefully and consider the fund's investment objectives and risks before investing. Links to prospectuses are available at hsa.associatedbank.com or by contacting the fund directly. Mutual fund performance data and ratings represent past performance and are not a guarantee of future results. **Funds in the Health Savings Investment Account are NOT deposits or obligations of, insured or guaranteed by Associated Banc-Corp or any other bank or affiliate, are NOT insured by the FDIC or any agency of the United States, and involve INVESTMENT RISK, including POSSIBLE LOSS OF VALUE.** Contract administration services are provided by Associated Trust Company, N.A. to Associated Bank, N.A., for which an Health Savings Investment Account is charged an account fee of \$7.50 and service fee of \$0.90 per \$1,000 (9 basis points) of investment account balance per quarter. Associated Trust Company, N.A. is an affiliate of Associated Banc-Corp. *Deposit products are offered by Associated Bank, N.A., Member FDIC. (4/15) 0021_7434