

Beneficiary Designation Form



Email, Fax, or Mail completed forms to:

Email: hsaoperations@motivhealth.com **Fax:** 844-533-1289

Mail: MotivHealth, Attention: HSA Operations
PO Box 709718 Sandy, UT 84070-9718

Note: If you are married and living in a community property state (AK, AZ, CA, ID, LA, NV, NM, TX, WA, WI), and you want to designate a primary beneficiary other than your spouse, your spouse must agree in writing to your designation and you must submit a physical copy of this form by mail or fax. You should consult your legal/tax advisor when completing this form, as there may be tax and/or legal consequences to your designation. You have the option to list one or more persons to be the primary and contingent beneficiaries for your HSA (including your estate or a trust) as applicable. If designating multiple primary or contingent beneficiaries, indicate the percentage share each should receive, ensuring the total of each adds up to 100%. Designations are effective upon receipt by MotivHealth and unless otherwise specified, cancel all previous HSA beneficiary designations on file.

Account Holder Information (all fields are required)		
Last Name	First Name	M.I.
E-Mail Address	Daytime Phone	SSN or MotivHealth ID Number (6 or 7 digits)

Primary Beneficiary(ies)
To ensure timely completion of your request, please complete all fields for each beneficiary you designate.

Primary Beneficiary 1	Estate/Trust	Yes	No
Name			
Address	City	State	ZIP
Relationship			Percent %

Primary Beneficiary 2	Estate/Trust	Yes	No
Name			
Address	City	State	ZIP
Relationship			Percent %

Primary Beneficiary 3	Estate/Trust	Yes	No
Name			
Address	City	State	ZIP
Relationship			Percent %

Primary Beneficiary 4	Estate/Trust	Yes	No
Name			
Address	City	State	ZIP
Relationship			Percent %

Contingent Beneficiary(ies)

Contingent beneficiaries receive your HSA assets in the event that all of your primary beneficiaries pass away before you.

Contingent Beneficiary 1 Estate/Trust Yes No

Name	SSN or TIN	Date of Birth (mm/dd/yyyy)	
Address	City	State	ZIP
Relationship	Percent		%

Contingent Beneficiary 2 Estate/Trust Yes No

Name	SSN or TIN	Date of Birth (mm/dd/yyyy)	
Address	City	State	ZIP
Relationship	Percent		%

Total 100%

Authorization

Participant Signature	Name (please print)	Date
<p>If you're a resident of a community or marital property state and have designated a beneficiary other than, or in addition to, your spouse, have your spouse authorize the designation by signing below.</p> <p>Spousal Consent: I am the legal spouse of the HSA account holder. I acknowledge that I have received a fair and reasonable disclosure of my spouse's property and financial obligations. Due to the tax consequences of giving up my interest in this HSA, I have been advised to see a qualified tax professional. I hereby consent to the beneficiary designation(s) indicated above.</p>		
Spouse's Signature	Name (please print)	Date

