

Employer Name:	THE CLAREMONT COLLEGES
Account holder Information, Transfer Instructions & Authorization	

BenefitWallet Account Number9500

Your account number can be found in the upper right corner of your BenefitWallet Welcome Kit, cover letter, and statements. Transfer Request and Authorization:

Transfer 100% of my account balance and close my account*

New Trustee / Custodian Name:		PNC Bank	
Address:		PNC #010163, BIN 88163	
City, State Zip:		Milwaukee, WI 53288-0163	
Fee Amount:	\$0.00	Date that account will close:	January 28, 2019
Must be Received by Employer on: **	11/16/2018	Date that funds will be transferred to new custodian:	TBD

Mail this completed form to:	First Class Mail	Email
	The Claremont Colleges Services Attn: Benefits Administration 101 S. Mills Ave. Claremont, CA 91711	BENREPS@claremont.edu

* **Note:** If your account balance is less than the check issuance fee, as stated on your rate and fee schedule, that has been disclosed, your account will be closed and no check will be issued. Monthly maintenance fees will continue to be assessed in accordance with the disclosures and fee schedule until the account is closed. This may impact the amount of the transferred balance.

** **Note:** If this form is received after the scheduled *due date* to your employer, your request will be assessed a \$25.00 check issue fee and processed as an individual transfer in the order in which it was received.

I understand that I must request a transfer of any funds invested in my BenefitWallet HSA investment account to my BenefitWallet checking account prior to submission of this authorization to ensure proper movement of funds and 1099 distribution reporting.

I authorize BenefitWallet to transact upon my account, to transfer funds from the specified account to the Trustee/Custodian and account as indicated above.

Accountholder Name (Printed)	
Accountholder Signature	

Any questions should be directed to your Employer’s Human Resources department or the BenefitWallet Service Center at 1-877-472-4200.