

Request for Health Savings Account Details

Date: [Insert Date]

To: [Recipient's Name]

Title: [Recipient's Title]

Company/Organization: [Recipient's Company]

Address: [Recipient's Address]

Dear [Recipient's Name],

I hope this message finds you well. I am writing to request detailed information regarding my tax-deferred Health Savings Account (HSA) held with [Institution Name]. For my records and financial planning, I would appreciate if you could provide the following details:

- Account number
- Account balance as of [specific date]
- Contributions made to date
- Withdrawals made to date
- Investment options available
- Any applicable fees

Thank you for your attention to this matter. I look forward to your prompt response.

Sincerely,

[Your Name]

[Your Address]

[Your Phone Number]

[Your Email Address]