



UMB HSAs: Healthcare solutions that make you look good

You already know that HSAs can benefit your clients and their employees. And when a plan is administered smoothly, your client is happy, and you look good. But a poorly administered plan can leave you with a black eye (or worse). So how do you help your clients implement HSAs successfully? You find the best possible partner to work with.



Healthcare Services

The spotlight is on *you* and the value you provide.

You want to retain current clients and win new ones. And when you work with UMB, we'll help you do both. We understand that in today's environment, it's more important than ever for you to demonstrate your value to clients. Our **business-building tools** support and enhance your value every step of the way—helping you solidify your relationships and win more business. Plus, you earn **competitive rewards** when you work with us.

Your clients get flawless implementation. And you get the credit.

Employers want an easy and effective implementation process, and that's just what we'll provide. We've designed our systems to deliver a flawless experience, including:

- **Implementation toolkit** with clear tools and resources to help employers know what to expect.
- **Launch and ongoing communications toolkits** that combine content written for people (not actuaries) and the right mix of print, online and social media tools used year-round turns employees and families into savvy health care users and savers.
- **Employer portal** to manage employer contributions and employees' accounts, along with detailed monthly reporting and other resources.
- Ongoing support and resources, including your **relationship manager** and UMB's service center representatives.

- **Business partner portal** that allows you detailed access to your clients' HSA plans – view plan information, implementation status, enrollments, employee rosters, account status, and comprehensive reporting for every group.

HSAWorks® – Our robust data reporting and analytics tool will make you a Strategy Star.

Within the portal you will also have access to HSAWorks®—the most comprehensive reporting and analytics tools in the industry. HSAWorks' detailed reporting empowers you to identify and analyze trends for your clients by providing aggregated data that not only looks at employee activity and numbers month-to-month, but also provides a view of the lifetime activity of the account. By better understanding these trends, your clients' can react to and influence employee health decisions leading to improved wellness and cost containment.

UMB by the numbers

More than **\$1 billion** in HSA assets held on behalf of account holders

More than **600,000** individual accounts

More than **4.3 million** healthcare spending account cards

A+/A- rating by Fitch/Standard & Poor's

More than **100 years** in business

Contact us today to learn more.

To help make your job easier, a local UMB representative is at your service. Whether you need information, a partner to join you at a sales call or assistance at an enrollment meeting, your rep is there for you.

Reach your sales representative.
Call: 1.888.677.1115
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UMB Healthcare services, a division of UMB Financial Corporation, delivers custodial services for health savings accounts (HSAs) and private label, multipurpose debit cards to insurance carriers, third-party administrators, software companies, employers and financial institutions.