UMB leads the industry with the Business Partner Portal, the first portal to provide easy and secure access to real-time account information, extensive reporting tools and valuable resources to help your clients build a customized management approach for their Health Savings Account (HSA) program.

Dashboard

Receive a real-time snapshot for all of your employer groups and individual businesses when you log into UMB’s Business Partner Portal. From the Dashboard you can view pending and future-dated enrollment statuses for all employee accounts, as well as all open accounts for each of your groups.

Reporting

The UMB Business Partner Portal offers reporting tools for all employer groups, regardless of size, to increase your clients’ understanding of account holder activity. You can run reports by month or as of the current date and then export them to Excel or PDF format.

Account Summary Report

- Total customer accounts
- Account breakdowns
- Investment totals
- Average account balance
- Contribution and distribution activity
Account Detail Report

Sort all HSA and enrollment activity associated with an employer group by:

- Location
- Date of activation
- Account status

Additional Resources

Go the extra mile for your customers with the following resources:

- **Employer Manager Tab** – Manage the Employer Group setup process by downloading the employer form and necessary setup information for your clients.
- **Partner Resources Tab** – Access marketing and sales materials, including our innovative benefit communication toolkits to help your clients build a successful communication strategy.
- **Benefit Communication Toolkits** – Help educate your clients, as well as increase participation in their HSA programs.
- **Learning Center** – Also access our Learning Center through the Partner Resources Tab for training and educational resources, as well as helpful information regarding HSAs.

UMB Healthcare Services, a division of UMB Financial Corporation (NASDAQ:UMBF), 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.

Investments made through the HSA are not FDIC insured. Securities offered through UMB Financial Services, Inc., member FINRA, SIPC. UMB Financial Services, Inc. is a subsidiary of UMB Bank n.a. UMB Bank n.a. is a wholly-owned subsidiary of UMB Financial Corporation. UMB Financial Services, Inc., is not a bank and is separate from UMB Bank n.a. and other banks.

Investments in securities, whether through the money market sweep account or through other investment options available in the brokerage account are:

- Not FDIC Insured
- May Lose Value
- No Bank Guarantee

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