



Delight Your Clients With a Winning HSA Solution

You know what your clients want: a premier HSA solution. One that's easy to implement and integrate, efficient to operate, saves them time and money and—most importantly—attracts and retains employees with financial wellness tools that helps them plan, save, and pay for health care expenses. For that, you need a partner that's stable, flexible, efficient, and driven to delight. That's UMB.



Three Ways to Earn

Our unique commission structure gives you 3 ways to earn:

- **Monthly commission:** You receive a set dollar amount every month for every HSA accountholder.
- **Bonus commission:** You receive a flat dollar amount per HSA accountholder for when the account opens.
- **Transfer incentive:** You receive a percentage of all transferred balances.

All the Credit Goes to You

Demonstrate your expertise, value, and credibility by recommending an industry-leading HSA solution. Then, enjoy the accolades when you deliver a turnkey solution—powered by UMB's industry-leading experience and technology—that includes everything to get your client's HSA up and running quickly:

- An online experience that makes it effortless for employees to understand and navigate their HSA. Plus, phone, email and chat support when they need it.
- Employee-facing communication toolkits proven to drive employee HSA engagement and shape employee saving and spending behavior.
- An employer portal for managing employer contributions and employee accounts, and detailed monthly reporting.
- A business partner portal that provides you with easy and secure access to real-time account information, along with reporting and data analytics tools.
- A customer service platform to help your clients and their employees get the information they need quickly and easily.

We've Got Your Back



- 106 years of financial leadership
- Among the top 5 HSA custodians in the nation
- Nearly 1.5 million HSA account holders trust UMB
- More than \$3 billion in HSA assets and deposits
- More than 5.4 million healthcare spending cards in circulation

To learn more, contact us directly.

Call: 888.677.1115

Email: HSAbrokers@umb.com

hsa.umb.com