

# HSA Accountholder Materials



Item number	Item Name	Description	URL
ACT01	Accountholder brochure	8 pg brochure providing accountholders an overview of the benefits of an HSA and the basics on how to use the account.	<a href="https://content.umb.com/file?uuid=58744ae6-6723-48a7-bed2-321dc2fa4d7a">https://content.umb.com/file?uuid=58744ae6-6723-48a7-bed2-321dc2fa4d7a</a>
ACT02	Saving and spending	2 pg flyer offers accountholders tips and information on how to balance saving and spending in an HSA	<a href="https://content.umb.com/file?uuid=0b2b650e-6ab8-40d0-aa55-5e5ddbedd95a">https://content.umb.com/file?uuid=0b2b650e-6ab8-40d0-aa55-5e5ddbedd95a</a>
ACT05	Top questions	4 pg brochure provides answers to accountholder frequently asked HSA questions.	<a href="https://content.umb.com/file?uuid=9c945370-122b-4d1c-98ba-09301a55bd11">https://content.umb.com/file?uuid=9c945370-122b-4d1c-98ba-09301a55bd11</a>
ACT07	Qualified Medical Expenses	2 pg flyer provides an overview list of HSA qualified medical expenses.	<a href="https://content.umb.com/file?uuid=c332998a-2c4e-461d-8064-c4157ee85662">https://content.umb.com/file?uuid=c332998a-2c4e-461d-8064-c4157ee85662</a>
ACT08	Income Tax Checklist	1 pg flyer is an HSA tax checklist for accountholders providing information on what IRS forms will need to be filed for their Federal Tax Return.	<a href="https://content.umb.com/file?uuid=b84fb09a-313f-4dae-9090-460000bcb990">https://content.umb.com/file?uuid=b84fb09a-313f-4dae-9090-460000bcb990</a>
ACT10	HSA Saver brochure	4 pg brochure provides an accountholder overview of the HSA Saver portal with screenshots.	<a href="https://content.umb.com/file?uuid=334f8495-0f7a-436c-959b-c9c3c81aac4d">https://content.umb.com/file?uuid=334f8495-0f7a-436c-959b-c9c3c81aac4d</a>
ACT10i	HSA Saver Insert	2 pg flyer provides accountholders with a list of HSA Saver mutual funds.	<a href="https://content.umb.com/file?uuid=b5c29634-a8b8-4283-b3e7-8c2874390696">https://content.umb.com/file?uuid=b5c29634-a8b8-4283-b3e7-8c2874390696</a>
ACT13	HSA Saver Enrollment Guide	5 pg document provides accountholders a step by step overview of how to enroll and invest in the HSA Saver.	<a href="https://content.umb.com/file?uuid=c71ab577-5722-4cde-9cd4-d200074c4dcb">https://content.umb.com/file?uuid=c71ab577-5722-4cde-9cd4-d200074c4dcb</a>
ACT16	Employee Powerpoint presentation	30 slide employee presentation dives into the basics of an HSA, eligibility, benefits and how it works.	<a href="https://content.umb.com/file?uuid=040fc9c2-05d4-4750-9a67-1d7dcac84f53">https://content.umb.com/file?uuid=040fc9c2-05d4-4750-9a67-1d7dcac84f53</a>
<b>Forms</b>			
ACTF01	Account Closure	1 pg accountholder form used to request closure of an HSA account.	<a href="https://content.umb.com/file?uuid=72766f33-1ae3-47bd-81f8-7e11cda60517">https://content.umb.com/file?uuid=72766f33-1ae3-47bd-81f8-7e11cda60517</a>
ACTF02	Account Withdrawal	2 pg accountholder form used to request a withdrawal from an HSA account.	<a href="https://content.umb.com/file?uuid=8fd9d1f6-9552-49fe-9e10-0d7ca4b39480">https://content.umb.com/file?uuid=8fd9d1f6-9552-49fe-9e10-0d7ca4b39480</a>
ACTF03	Address Change	1 pg accountholder form used to request address change for an HSA account.	<a href="https://content.umb.com/file?uuid=687ac2b1-b7d4-419e-a158-2d103e6e27ba">https://content.umb.com/file?uuid=687ac2b1-b7d4-419e-a158-2d103e6e27ba</a>
ACTF04	Beneficiary	1 pg accountholder form used to designate a beneficiary for an HSA account.	<a href="https://content.umb.com/file?uuid=f605fb97-ba45-4f8b-aabd-147bd1b9f097">https://content.umb.com/file?uuid=f605fb97-ba45-4f8b-aabd-147bd1b9f097</a>
ACTF05	Consolidate HSAs	2 pg accountholder form used to request a consolidation of HSAs.	<a href="https://content.umb.com/file?uuid=3f111d4a-55ad-42c4-840f-d10979f61537">https://content.umb.com/file?uuid=3f111d4a-55ad-42c4-840f-d10979f61537</a>
ACTF06	Contributions	2 pg accountholder form used to request a contribution into an HSA or MSA account.	<a href="https://content.umb.com/file?uuid=85f55a27-364b-476b-a955-1bba0cd8a37d">https://content.umb.com/file?uuid=85f55a27-364b-476b-a955-1bba0cd8a37d</a>
ACTF07	Customer Signature	1 pg accountholder form used to provide accountholder signature to bank.	<a href="https://content.umb.com/file?uuid=1537657c-e859-44fb-b888-fe7d7365a393">https://content.umb.com/file?uuid=1537657c-e859-44fb-b888-fe7d7365a393</a>
ACTF08	Deceased Distribution	2 pg form to authorize the distribution of assets from a decedent's HSA directly to the claimant. Form to be completed by designated beneficiary or estate representative.	<a href="https://content.umb.com/file?uuid=14cbf71b-f4da-4dac-828d-7cf7b60e0d89">https://content.umb.com/file?uuid=14cbf71b-f4da-4dac-828d-7cf7b60e0d89</a>
ACTF9	Name Change	1 pg accountholder form used to request name change on an HSA.	<a href="https://content.umb.com/file?uuid=1f0c7889-adf1-4914-91ef-c05c8681fd27">https://content.umb.com/file?uuid=1f0c7889-adf1-4914-91ef-c05c8681fd27</a>
ACTF10	Paper Enrollment	2 pg accountholder paper enrollment form for individuals to enroll in an HSA that do not have access to online enrollment.	<a href="https://content.umb.com/file?uuid=7ccfe7ac-552a-41d4-8d69-1a2b742ce8fe">https://content.umb.com/file?uuid=7ccfe7ac-552a-41d4-8d69-1a2b742ce8fe</a>
ACTF11	Reverse Contribution	2 pg accountholder form to request authorization from the employer to reverse an HSA contribution. Form must be filled out by the accountholder and employer.	<a href="https://content.umb.com/file?uuid=2fd4f08e-c353-45b1-a98c-ad890b045356">https://content.umb.com/file?uuid=2fd4f08e-c353-45b1-a98c-ad890b045356</a>
ACTF12	Trustee Transfer	2 pg accountholder form to request the transfer of an HSA from another custodian to UMB.	<a href="https://content.umb.com/file?uuid=56b746d1-5015-4437-bdc5-ac1053151c4f">https://content.umb.com/file?uuid=56b746d1-5015-4437-bdc5-ac1053151c4f</a>