

1p Frequently asked questions on designating a beneficiary for your HSA

[ACT22](https://p1.aprimocdn.net/umb/d10989b1-2b88-439f-bfde-b089012e2d55/ACT22_HSA_Beneficiary_Designation_FAQs_Original_file.pdf) [**HSA Beneficiary Designation FAQs**](https://p1.aprimocdn.net/umb/d10989b1-2b88-439f-bfde-b089012e2d55/ACT22_HSA_Beneficiary_Designation_FAQs_Original_file.pdf)

1p How to change from paper statements to eStatements

[ACT21](https://p1.aprimocdn.net/umb/7b333fa5-1725-4f76-9a30-b07c00528751/ACT21_HSA_eStatements_Selection_Original_file.pdf) [**HSA eStatements Selection**](https://p1.aprimocdn.net/umb/7b333fa5-1725-4f76-9a30-b07c00528751/ACT21_HSA_eStatements_Selection_Original_file.pdf)

[ACT20](https://p1.aprimocdn.net/umb/c684b3dc-7b93-47f4-b8d7-b07c005298fa/ACT20_HSAs_and_Medicare_Original_file.pdf) [**HSAs and Medicare**](https://p1.aprimocdn.net/umb/c684b3dc-7b93-47f4-b8d7-b07c005298fa/ACT20_HSAs_and_Medicare_Original_file.pdf)

2p Contributions and Distributions after Medicare enrollment

HSA-AR 09-2023

© 2023 UMB Financial Corporation

**Form ID & Name Description**

HSA Accountholder Resources

**Item ID & Name Description**

[ACT01](https://p1.aprimocdn.net/umb/10986490-22cf-456c-a969-b07c004222f5/ACT01_HSA_Accountholder_Brochure_Original_file.pdf) [**HSA Accountholder Brochure**](https://p1.aprimocdn.net/umb/10986490-22cf-456c-a969-b07c004222f5/ACT01_HSA_Accountholder_Brochure_Original_file.pdf)

8p brochure overview of the benefits of an HSA and the basics on how to use the account

[ACT02](https://p1.aprimocdn.net/umb/1f51b966-8517-4953-86b7-b07c005262c6/ACT02_Saving_and_Spending_HSA_Dollars_Original_file.pdf) [**Saving and Spending HSA Dollars**](https://p1.aprimocdn.net/umb/1f51b966-8517-4953-86b7-b07c005262c6/ACT02_Saving_and_Spending_HSA_Dollars_Original_file.pdf)

2p tips and information on how to balance saving and spending in an HSA

[ACT03](https://p1.aprimocdn.net/umb/382cfd81-3a9d-4da2-b5ef-b07c00527b6f/ACT03_Quick_Guide_to_HSAs_Original_file.pdf) [**Quick Guide to HSAs**](https://p1.aprimocdn.net/umb/382cfd81-3a9d-4da2-b5ef-b07c00527b6f/ACT03_Quick_Guide_to_HSAs_Original_file.pdf)

1p high-level overview of HSAs

[ACT04](https://p1.aprimocdn.net/umb/2da39d5d-c194-4f3e-a7a7-b07c005259be/ACT04_HSA_Contribution_Rules_Married_Original_file.pdf) [**HSA Contribution Rules Married**](https://p1.aprimocdn.net/umb/2da39d5d-c194-4f3e-a7a7-b07c005259be/ACT04_HSA_Contribution_Rules_Married_Original_file.pdf)

2p HSA Contribution rules for married couples

[ACT05](https://p1.aprimocdn.net/umb/e178ce38-36be-441e-90a0-b07c005259c3/ACT05_Top_Questions_About_HSAs_Original_file.pdf) [**Top Questions About HSAs**](https://p1.aprimocdn.net/umb/e178ce38-36be-441e-90a0-b07c005259c3/ACT05_Top_Questions_About_HSAs_Original_file.pdf)

2p answers to frequently asked HSA questions

[ACT07](https://p1.aprimocdn.net/umb/a99c96d7-ab7d-4106-a2bc-b07c0052596d/ACT07_HSA_Qualified_Medical_Expenses_Original_file.pdf) [**HSA Qualified Medical Expenses**](https://p1.aprimocdn.net/umb/a99c96d7-ab7d-4106-a2bc-b07c0052596d/ACT07_HSA_Qualified_Medical_Expenses_Original_file.pdf)

2p overview list of HSA qualified medical expenses

[ACT08](https://p1.aprimocdn.net/umb/311ccf41-520c-4761-8aa1-b07c005269ec/ACT08_HSA_Income_Tax_Checklist_Original_file.pdf) [**HSA Income Tax Checklist**](https://p1.aprimocdn.net/umb/311ccf41-520c-4761-8aa1-b07c005269ec/ACT08_HSA_Income_Tax_Checklist_Original_file.pdf)

1p HSA tax checklist info on what IRS forms will need to filed for Federal Tax Return

[ACT10](https://p1.aprimocdn.net/umb/3d9a1a73-0975-4bbe-bfff-b07c00527c03/ACT10_Investing_with_HSA_Saver_Brochure_Original_file.pdf) [**Investing with HSA Saver Brochure**](https://p1.aprimocdn.net/umb/3d9a1a73-0975-4bbe-bfff-b07c00527c03/ACT10_Investing_with_HSA_Saver_Brochure_Original_file.pdf)

4p brochure overview of the HSA Saver portal with screenshots

[ACT10i](https://p1.aprimocdn.net/umb/7546adb1-34fe-4d9d-aa6d-b07c005259da/ACT10i_HSA_Saver_Invest_in_Your_Future_Original_file.pdf) [**HSA Saver Invest in Your Future**](https://p1.aprimocdn.net/umb/7546adb1-34fe-4d9d-aa6d-b07c005259da/ACT10i_HSA_Saver_Invest_in_Your_Future_Original_file.pdf)

2p list of HSA Saver mutual funds

[ACT10x](https://p1.aprimocdn.net/umb/1c197dee-f13c-4def-a57e-b07c0052876e/ACT10x_HSA_Saver_Fund_List_Original_file.pdf) [**HSA Saver Fund List**](https://p1.aprimocdn.net/umb/1c197dee-f13c-4def-a57e-b07c0052876e/ACT10x_HSA_Saver_Fund_List_Original_file.pdf)

1p Funds Available for Investments

[ACT13](https://p1.aprimocdn.net/umb/8941cba9-ecbe-4d87-b1b3-b07c00525539/ACT13_UMB_HSA_Enrollment_Guide_Original_file.pdf) [**UMB HSA Investment Enrollment Guide**](https://p1.aprimocdn.net/umb/8941cba9-ecbe-4d87-b1b3-b07c00525539/ACT13_UMB_HSA_Enrollment_Guide_Original_file.pdf)

4p step by step overview of how to enroll and invest in the HSA Saver

[ACT15](https://p1.aprimocdn.net/umb/b8c5525c-4c92-4e73-bb16-b07c00527848/ACT15_HSA_Online_Banking_and_Education_Original_file.pdf) [**HSA Online Banking and Education**](https://p1.aprimocdn.net/umb/b8c5525c-4c92-4e73-bb16-b07c00527848/ACT15_HSA_Online_Banking_and_Education_Original_file.pdf)

2p how to enroll, access, and use your HSA account

[ACT16](https://p1.aprimocdn.net/umb/5724e4af-33d6-49a5-a5ac-b07c0052552c/ACT16_Understanding_HSAs_Employee_Presentation_Original_file.pdf) [**Understanding HSAs Employee Presentation**](https://p1.aprimocdn.net/umb/5724e4af-33d6-49a5-a5ac-b07c0052552c/ACT16_Understanding_HSAs_Employee_Presentation_Original_file.pdf)

28p ppt presentation explains the basics of an HSA, eligibility, benefits and how it works