



UMB Contacts

UMB Products:

HSA, FSA, HRA, Commuter, and Lifestyle Benefit Spending Accounts

Broker Services

888.677.1115

HSABrokers@umb.com

UMB.com/broker-benefit-accounts

- Employee UMB HSA Account Status and Account Number Information
- UMB Broker Portal Access Assistance (Employer Enrollment Reports and HSA Summary Reports)
- Employee Enrollment, Terminations, Contribution/Transaction Confirmations

Employer Services

855.664.4160

HSAAdministration@umb.com

UMB.com/employer-benefit-accounts

- Employee UMB HSA Account Status and Account Number Information
- HSA Contribution Inquiries and Assistance
- UMB Employer Portal Access Set Up Requests and Password Resets
- Enrollment Verification and Assistance/Termination Requests
- Forms

Employee Services

866.520.4472 Toll Free

816.474.4472 Kansas City

Automated account information available 24-hours a day.

Live service personnel and web chat are available 7 a.m.–7:30 p.m. CT Monday through Friday and

8 a.m.–5 p.m. CT on Saturdays.

UMB.com/benefit-accounts

- Account Balance and Transaction Information
- New/Replacement Debit Card Requests
- Lost/Stolen Card Notifications
- Online Banking Assistance
- Statement Delivery Method Changes
- Address Changes
- General Questions

UMB Sales Team Resources

Prospective and New Group Sales

Brad Christensen Vice President, Business Development

414.801.2877

Bradley.Christensen@umb.com

- Prospective and New Healthcare Group Sales
- RFP/Questionnaire/ Proposals and Pre-Sale Support
- Presentations
- New Contracts
- Implementation

Client Experience

Gail Brame AVP, Sr. Account Executive

816.860.7003

Gail.Brame@umb.com

- Issue escalation not resolved through channels above
- New Products, Services and Integration Requests
- Marketing Materials and Support
- Contract Questions