



Hello Sally!

Welcome to your UMB Health Savings Account Dashboard

\$5,279.62

MY TOTAL BALANCE

MY SAVINGS
\$2,000.00MY INVESTMENTS
\$3,279.62

Tax Season is Coming!

Your 1099-SA and 5498-SA tax forms are ready!

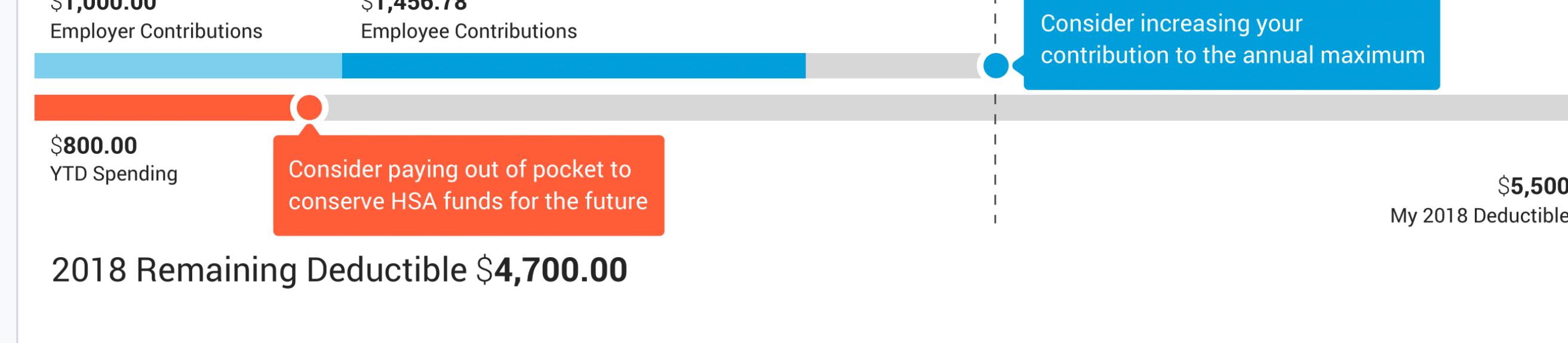
[View Tax Forms](#)

Account Tasks

- Enroll in Paperless eStatements and save on fees and reduce your environmental footprint.
- My Investments: The fund CUSIP (XXXX) is no longer available. Please review the list of funds for future investment selections. [Learn More](#)

Maximize Your HSA

2018 Contributions \$2,456.78



2018 Remaining Deductible \$4,700.00

Retirement Savings Goal

\$5,279.62

Make Contribution

RETIREMENT GOAL
\$202,000

Help Me Reach My Goal

Save

Saving for goals is now even easier when setting up Recurring Self-Directed Contributions to your HSA

[Learn More](#)

Activity

Walgreens purchase of -\$123.04

Auto Payroll Contribution of \$200.00

Auto Payroll Contribution of \$200.00

[View More Activity](#)

ReceiptVault You have 2 Uncategorized Receipts

[Manage Receipts](#)
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MY SAVINGS \$2,000.00

MY INVESTMENTS \$3,279.62

Recent Transactions & eStatements

Recent Transactions & eStatements Spending Summary ReceiptVault Tax Reporting

DATE	DESCRIPTION	AMOUNT	BALANCE
11/15/18	Walgreens	-\$123.04	\$4,523.19
11/12/18	Auto Payroll Contribution	\$200.00	\$4,646.23
10/28/18	Auto Payroll Contribution	\$200.00	\$4,446.23
10/28/18	Paper Statement Fee	-\$1.50	\$4,246.23
10/17/18	Bill Pay: St. Mary's Hospital	-\$328.00	\$4,247.73
10/14/18	Auto Payroll Contribution	\$200.00	\$4,575.73
10/3/18	Auto Payroll Contribution	\$200.00	\$4,375.73
9/28/18	Online Transfer	-\$300.00	\$4,175.73
9/22/18	CVS	-\$5.55	\$4,475.73
9/21/18	CVS	-\$8.43	\$4,481.28
9/21/18	Auto Payroll Contribution	\$200.00	\$4,489.71
9/17/18	Bill Pay: St. Mary's Hospital	-\$328.00	\$4,289.71
9/7/18	Auto Payroll Contribution	\$200.00	\$4,617.71
8/27/18	Auto Payroll Contribution	\$200.00	\$4,417.71
8/27/18	Employer Contribution	\$200.00	\$4,217.71
8/19/18	Reimbursement: CoreChecking(****0009)	-\$50.00	\$4,017.71

[View 20 Rows](#)[Download to...](#)

DATE	DESCRIPTION
10/1/18	3rd Quarter Statement - 2018
7/1/18	2nd Quarter Statement - 2018
4/1/18	1st Quarter Statement - 2018
1/2/18	4th Quarter Statement - 2017

[View Historical Statements](#)

ReceiptVault You have 2 Uncategorized Receipts

[Manage Receipts](#)
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Send Money

MY SAVINGS \$2,000.00

MY INVESTMENTS \$3,279.62

Send Money Recurring Transfers Manage External Accounts/Payees ReceiptVault

Reimburse Myself

When making a Reimbursement please ensure you have all HSA eligible receipts within UMB ReceiptVault.

[Make a Contribution](#)[Pay a Bill](#)

REIMBURSE MYSELF

From * Sally's HSA (****1234)

Pay to * CoreChecking(****0009)

Amount * \$

Memo Self Reimbursement

Apply to Current Year Prior Year

DATE AND FREQUENCY

Date * 11/15/2018

Recurring * No

[Submit](#)

ReceiptVault Create documentation to support your self reimbursements for audit purposes.

[Add Receipt to ReceiptVault](#)
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