



**Health Savings Account  
Contact and Information Guide**

**For Employers:**

**Hours Available – 8 a.m. to 5 p.m. CST Monday through Friday**

**Toll free HSA Specialist number – 866-740-8666**

- We will be happy to assist with any questions regarding your HSA needs.

**Email – [WholesaleHSA@AssociatedBank.com](mailto:WholesaleHSA@AssociatedBank.com)**

- If sending information such as account numbers, social security numbers and other private information please send a secure email.
- If you do not have access to secure email, please send an email to the address above requesting that we send a secure email to you. When you reply to that email, it will be secure.

**Mailing Address**

Associated Bank, N.A.  
1305 Main St--MS 7741  
Stevens Point, WI 54481

**Fax number – 715-345-4024**

- Please include a cover sheet addressed with Attn: HSA Department

**Health Savings Account Specialists**

**Amanda Hauser**

Phone – 715-345-4711

Email – [Amanda.Hauser@AssociatedBank.com](mailto:Amanda.Hauser@AssociatedBank.com)

**Jason Drapes**

Phone – 715-345-4752

Email – [Jason.Drapes@AssociatedBank.com](mailto:Jason.Drapes@AssociatedBank.com)

**Brady Kluck, Health Savings Account Supervisor**

Phone – 715-345-4731

Email – [Brady.Kluck@AssociatedBank.com](mailto:Brady.Kluck@AssociatedBank.com)

**Joe Orsund, AFG Specialty Group Solutions Manager**

Phone – 715-345-4735

Email – [Joe.Orsund@AssociatedFinancialGroup.com](mailto:Joe.Orsund@AssociatedFinancialGroup.com)

**New Accounts & Account Changes**

- New or updated applications may be scanned and sent to us via secure email. If you are not able to do this, we accept faxed or mailed applications.
- We will expedite your new account needs and any account changes requested. Account changes include address changes, addition or termination of Limited Power of Attorney, name changes and other changes as requested.

## **Funding Options**

**ACH Transfer** — Fund transfers may be originated by an Automated Clearing House (ACH) file or transaction file sent through Associated Bank using your software, a payroll company or Associated's online banking for businesses, Associated Connect (requires an Associated business checking account). An authorization form must be received before the ACH direct deposit file or transaction file. A separate ACH Agreement is required if using Associated Connect. This is not needed when using another bank or payroll company for ACH.

**Secure Web** — Funds transfers may be originated through Associated Bank's Secure Web access. A login and password will be assigned to you, giving you access to upload a spreadsheet containing funding information. Associated Bank will then fund the accounts according to your instructions and debit your business account for the matching amount. An authorization form must be received before receipt of the formatted spreadsheet for funding.

## **Fee Options**

**New Groups to Associated Bank will receive an initial 6 month fee waiver to assist balance growth.**

**Employer Paid** — Associated Bank, will originate an auto debit of \$3.50 to the account of your choice for every open Health Savings Account within your employee group. Employer must notify Associated Bank of any terminated employees by sending an email to [HealthSavingsAccounts@AssociatedBank.com](mailto:HealthSavingsAccounts@AssociatedBank.com).

**Employee Paid** — Each employee account will be debited \$3 on the last business day of the month if the employee does not meet one of the following criteria:

- Health Savings Account minimum daily balance of \$1,000 or more;
- Combined average monthly Associated Bank deposit relationship (checking, savings, money market, CD and HSA) of \$2,000 or more;
- Employee has an open, active Health Savings Investment Account (subject to a \$7.50 quarterly investment fee); or
- Administration fee paid by the employer.

## **For Employees**

### **Customer Care – 800-992-2651**

- Available 24 hours a day, 7 days a week

### **Lost or Stolen check cards**

- In addition to being able to call Customer Care, you can call 800-556-5678 to report your check card as lost or stolen.

### **[www.HSA.AssociatedBank.com](http://www.HSA.AssociatedBank.com)**

- Provides employees with the following information
  - HSA highlights (includes a link to the HSA Regulations at the IRS site)
  - Fund listing for HSA Investment Accounts with links to fund details
  - Frequently Asked Questions
  - HSA Forms
  - Contact Us Information including phone, email, and mailing address information
  - Account Access provides a link to Associated Bank's personal online banking system