

Thank you for choosing Financial Center as your custodian for employee Health Savings Accounts. Electronic signatures make the enrollment process easy and convenient for you and your employees.

Census data

As a financial institution we are required to identify all new members as part of the Consumer Identification Program (CIP). With your help, we may identify your employees prior to the online enrollment to avoid requiring copies of identification. In order to do so, please provide the following information:

- Census data for each eligible employee who elects the HDHP is requested in advance of enrollment and should include: (those in bold are required)
 - ✓ **Employee name**
 - ✓ **Email address**
 - ✓ **Date of birth**
 - ✓ **Social Security number**
 - ✓ **Address**
 - ✓ Driver's License (number, issue date, and expiration date)
 - ✓ Individual or family HDHP
 - ✓ Phone
- Please compile this information in an Excel spreadsheet and send via a secure file transmission
- After open enrollment season, provide this census data for each new employee once they become eligible for an HSA.

HSA funding

Our Member Experience Team will provide your Human Resources department with the proper account information to make funding easy

- Routing # - 274073876
- Direct deposit
- ACH funding

HSA certified support

Financial Center's Member Experience Team is available to serve both you and your employees with all of your HSA needs. This team of HSA certified individuals can provide specific and accurate information on Health Savings Accounts.

Employee contacts

Wayne Till & Zach Wilson
Member Experience Team
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