KeyBank

Key@Work

Health Savings Accounts (HSA)

Benefits of KeyBank's HSA program for your business

Service and support
KeyBank provides a dedicated, local team to service and support your employees' health savings accounts. Your employees can access their HSAs in one of our many conveniently-located branches.

Account options
Interest-bearing checking account plus investment account* options

Convenience
Convenient, easy-to-use account access through HSA starter checks, HSA debit cards and 24/7 online and mobile banking

Investing with an HSA*

Cover out-of-pocket medical costs with a KeyBank HSA and once contribution thresholds are met, your employees can begin investing that money on their own or with guidance from Key Investment Services.

Two simple options to get started today, regardless of your experience level in investing

1. Self-managed investing (unsolicited trades)

- This option allows for a simple easy-to-use way to manage investments in individual's accounts, following their own strategy
- Must keep $2,500 in HSA checking account and have a minimum of $1,000 to start investing

2. Managed with advisor support (solicited/advisor-led trades)

- Our seasoned professionals at Key Investment Services assist individuals with forming a portfolio strategy and executing trades based on your goals
- Must keep $6,000 in HSA checking account and have a minimum of $1,000 to start investing

Both options allow for tracking, updates and online trading through our client online banking portal. It's all part of a seamless experience that both empowers clients as investors and inspires the peace of mind that allows them to get back to their life.

Key provides continuous assistance for your HSA program

Simplify
account opening

- Online, On-site, and In-Branch Account Opening
- Open Enrollment Support
- Benefit and Wellness Fair Attendance

Deliver
one-on-one guidance by KeyBank Experts through:

- Open – enrollment meetings
- New-hire orientation
- HSA seminars

Provide
ongoing support

- HSA and Financial Wellness Education Seminars
- Employer Contribution Support
- Consider a Key@Work relationship

KeyBank HSA – Specific Fees

- Monthly statements: $3.00 paper statement fee, free online

It all begins with a conversation.

Schedule a Key Financial Wellness Review® at **key.com/appointment** or speak with your Branch Representative today.

* Investment products are offered through Key Investment Services LLC (KIS), member FINRA/SIPC and SEC-registered investment advisor. Insurance products are offered through KeyCorp Insurance Agency USA, Inc. (KIA). KIS and KIA are affiliated with KeyBank National Association (KeyBank). Investment and insurance products made available through KIS and KIA are:
NOT FDIC INSURED ● NOT BANK GUARANTEED ● MAY LOSE VALUE ● NOT A DEPOSIT ● NOT INSURED BY ANY FEDERAL OR STATE GOVERNMENT AGENCY
KIS, KIA and KeyBank are separate entities, and when you buy or sell securities and insurance products you are doing business with KIS and/or KIA, and not KeyBank.

Key.com is a federally registered service mark of KeyCorp. ©2024 KeyCorp.
KeyBank Member FDIC. 241101-2400878