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The Advisor Perspective on HSAs

Moderator:
Shelby George, JD, CEBS; CEO, Perspective Partners

Presenters:
Gary Allen, AIFA®, Principal, Prudent Investor Advisors

Todd Kading, President, LeafHouse Financial

Chad Wilkinson, Director of Retirement Plan Sales, P&A Group

Agenda

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1. Resources for advisors to learn about HSAs
2. Selection criteria for HSA vendors
3. Philosophy on HSA investments
4. How HSAs add value for your employer clients and employees
5. Summary and Q & A

Resources for advisors and starting the conversation about HSAs

Shelby George, JD, CEBS
CEO
Perspective Partners

Gary Allen, AIFA®
Principal
Prudent Investor Advisors

Todd Kading
President
LeafHouse Financial

Chad Wilkinson
Director of Retirement
P&A Group

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What prompted your first client conversation about HSAs and how has the dialogue evolved?

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Is it worth it?

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How long did it take to get comfortable with talking about HSAs and what resources were most helpful?

Selection criteria for HSA vendors

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How did you go about selecting potential HSA vendors? What criteria were important to you?

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How has the vendor landscape changed and what do you expect to see in the future?

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What does the vendor/advisor relationship look like? What should it look like?

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How is your relationship with health care brokers?

Philosophy on HSA investments

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What is your philosophy for HSA investment menus?

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Not all funds are available for HSAs – how do you handle that?

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Fees and pricing – are you charging asset based fees or consulting fees?

Adding value with HSAs

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Are employers of a certain size or profile more or less receptive to HSA services?

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What kinds of questions do your employers have about HSAs?

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What is your approach to employee education on HSAs?

Contact us

Visit us at:

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Q & A

Please submit any questions using the GoToWebinar interface

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THANK YOU