



inVesti Financial Launches HSA Solution with UMB Bank

inVesti Financial announces completion of integrations to UMB Bank and Matrix Trust Company, Broadridge Retirement and Workplace for its HSA product offering.

NEW YORK, NY, UNITED STATES, March 12, 2024 /EINPresswire.com/ -- inVesti Financial (inVesti), a leading solution provider for the enterprise financial and workforce benefits market, announced it has successfully integrated its inVesti-RKS (Record Keeping Services) software with UMB Bank, Health Care Services. This integration allows inVesti to offer an HSA solution to its product lineup, that also includes 401(k)s and IRAs. The HSA will also allow participants to invest in a multitude of investments such as mutual funds, and ETF's with Matrix Trust Company, Broadridge Retirement and Workplace's custodial platform. inVesti executed the integration of both UMB and Matrix simultaneously to offer a robust and unmatched health services solution. The HSA is available on both desktop and native mobile devices.

"inVesti is very excited to have the opportunity to partner with both UMB and Matrix for this product build and we look forward to delivering real world solutions to a clearly underserved and fragmented market," said Tom Hansen, inVesti's Cofounder and CEO. "This is a great instrument to address the ever-increasing need of our workforce participants for a unified environment. This integration not only offers an HSA but also ties together our retirement and self-assurance solutions with one dashboard, one login, and a proprietary communication engine to distribute necessary information across all those responsible for workplace retirement solutions."

The inVesti-RKS system is an open architecture, multi-vendor, cloud hosted financial software platform created to deliver dynamic retirement and workforce benefit solutions. The platform's forward facing APIs and webservice technology is built to remove the static of plan setup, enrollment, and regulatory management. The record keeping and the rules-based notification delivery platform is the foundation of the company's multitude of integrated products and services.

For further information please visit us at <https://investifinancial.com>

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