Banking Compliance

IRA and HSA Solutions

Manage and support your Individual Retirement Account (IRA) and Health Savings Account (HSA) business with services and solutions from Wolters Kluwer. From application documents and disclosures to account owner educational materials and training, our solutions help you streamline your processes.

Tax advantaged accounts

We focus on compliance so you can spend more time on other important aspects of your business. Our IRA/HSA experts continuously monitor federal laws to bring you the most current documents, solutions, and services. Don't settle for a mixed bag of solutions bundled with products you won't use. Customize your package with our complete line of solutions and services —all backed by superior customer service.

IRA and HSA Documents

Wolters Kluwer provides the documents your organization needs to open, administer, support, and promote traditional, Roth, SIMPLE, and SEP IRAs along with Coverdell Education Savings Accounts (CESA) and Health Savings Accounts (HSA) in electronic or print formats depending on your business needs.

IRA E-Forms (IEM)

Electronic forms from Wolters Kluwer allow you to document transactions throughout each account's lifecycle. The IRA E-forms modules include the documents you need to establish traditional IRAs, Roth IRAs, Coverdell Education Savings Accounts (CESAs), and Health Savings Accounts (HSAs), and process ongoing account transactions. E-forms eliminate the need to warehouse forms that may be rendered obsolete due to rule changes. Our electronic documents support most consumer deposit programs and integrate with many Wolters Kluwer partner software solutions.

Expere® Integrated Enterprise

Expere® Integrated Enterprise (Expere IE) was designed to help solve the strategic challenges large financial institutions face in managing compliance documentation across an enterprise. Expere IE is a complete solution for authoring, selecting, assembling, and managing compliance documents. It helps solve technology problems by bringing together all of your documentation systems to create a single solution that produces reliable compliance documents across all of your delivery channels.

Account Recordkeeping Service

Outsource the complex and burdensome tasks of administering tax-advantaged accounts with our Account Recordkeeping Services. Our system of electronic compliance checks help you eliminate reporting errors. We provide required reports for the IRS, your IRA owners, and your organization. We'll also help you manage account owners' required minimum distributions and keep you informed of regulation changes, new requirements, and other news. Plus, our periodic reports summarize account activity to help you analyze your accounts and grow your program.

Training

Our on-demand video and tailored training programs educate your staff on all aspects of tax-advantaged savings plans. Learn from the best in the industry—our instructors are IRA and HSA experts who also manage our Consulting Service and develop documents and training materials. We offer sessions for IRA professionals at all levels of experience. We also provide tailored IRA and HSA training at your location or remotely, customizing the training to your specific needs.*

Consulting

With the significant increase of consumers moving into retirement, supporting your IRA customers has never been more critical. Our IRA Consulting line will provide you with unlimited access to our team of experienced consultants. They can assist with day-to-day questions or can walk you through those situations that can be a bit more uncommon. Our IRA consultants will help provide the answers your team needs to support your IRA Customers.

IRA Electronic Book

The electronic version of our IRA Library employs a robust search engine to help you quickly find exactly what you're looking for. Create favorites for later reference or review one of the popular Quick Reference Guides. Stay up-to-date with annual updates and ensure your staff has the most current information available. Our IRA E-book can be installed on a network for easy access by many users or loaded individually onto separate desktops.

IRA and HSA Educational Brochures

Our educational brochures answer common questions about tax-advantaged accounts. Written in easy-to-understand language, they have just the right amount of information for the average account owner. We carefully monitor regulatory and legislative changes and update the content to ensure you are providing account owners with the most current information available. Our line of brochures is designed with a single style to ensure a consistent look when displayed.

*Dates and times subject to availability

About Wolters Kluwer Governance, Risk & Compliance

Governance, Risk & Compliance is a division of Wolters Kluwer, which provides legal and banking professionals with solutions to help ensure compliance with ever-changing regulatory and legal obligations, manage risk, increase efficiency, and produce better business outcomes. GRC offers a portfolio of technology-enabled expert services and solutions focused on legal entity compliance, legal operations management, banking product compliance, and banking regulatory compliance.

Wolters Kluwer (WKL) is a global leader in professional information, software solutions, and services for the healthcare; tax and accounting; governance, risk and compliance; and legal and regulatory sectors. We help our customers make critical decisions every day by providing expert solutions that combine deep domain knowledge with specialized technology and services. Wolters Kluwer reported 2021 annual revenues of €4.8 billion. The group serves customers in over 180 countries, maintains operations in over 40 countries, and employs approximately 19,800 people worldwide. The company is headquartered in Alphen aan den Rijn, the Netherlands.

For more information about our solutions and organization, visit **WoltersKluwerFS.com**

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