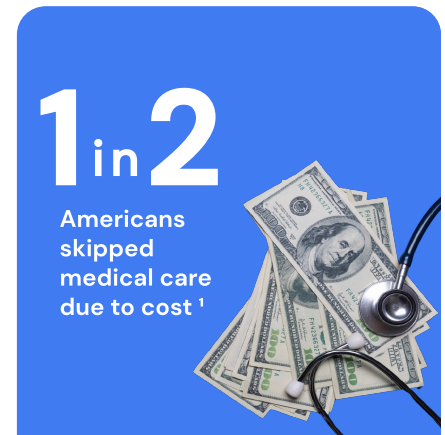


# Make HSA administration as easy as it should be

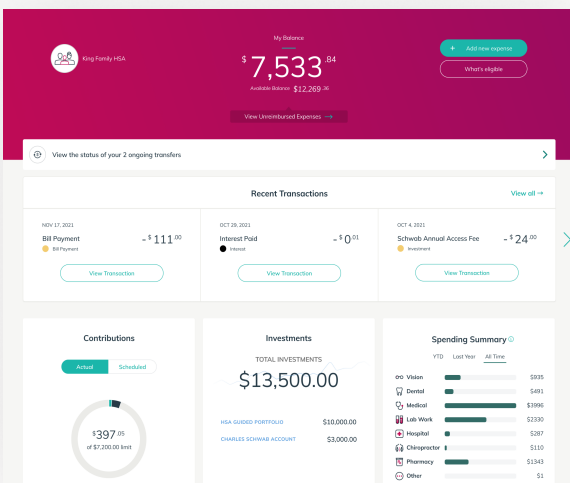
## Lively Health Savings Account

With healthcare costs continuing to rise, businesses are adopting high deductible plans (HDHPs) to help offset costs. This results in employees being forced to take stewardship over their healthcare, whether or not they are equipped to do so. (Spoiler: they are mostly not.)

The popularity of Health Savings Accounts (HSAs), designed to be paired with HDHPs, then comes as no surprise. Their unique triple-tax advantages make them a smart savings vehicle for the healthcare needs of today and tomorrow. But not all HSAs are built equal, and it shows in how account holders adopt their benefits.



## The Lively HSA experience



Lively HSA is thoughtfully designed at every step to alleviate administrative burdens and optimize the experience for employers and employees:



**Easy-to-use dashboards** – It's always easy to review account status and actions needed at a glance, even on the go with our highly-rated mobile app.



**Robust investments** – Account holders can invest their funds through low-cost solutions from Charles Schwab and Devenir, with no cash minimum requirement.



**Ongoing education** – Lively regularly communicates timely information throughout the year to help employees make the most of their health benefits.



**Support within reach** – Our exceptional team of HSA experts actively engages with employees, and employers have access to our Customer Success team.

INVESTOR'S BUSINESS DAILY

"BEST HSA PROVIDERS FOR 2024"

MORNINGSTAR®

"TOP HSA PROVIDERS OF 2023"

Forbes

"EXCELLENCE IN INNOVATION"

VISA

"TOP 50: THE MOST INNOVATIVE FINTECH COMPANIES IN 2020"

# Show employees you're on their side, effortlessly

Lively lightens the burden of HSA administration by automating tedious tasks and bringing transparency to a complex ecosystem.



## Proprietary, Agile Technology

We can seamlessly integrate with your various vendors, in a fraction of the standard time. Since we don't white-label our platform, we have full control of our product development and innovation. All powered by our advanced data models.



## Customer-Centric Experience

Our thoughtfully designed platform is simple and intuitive to use, on desktop or on the go. Each employer is assigned an onboarding specialist, and employees have access to our responsive and effective team of HSA experts year-round.



## Dynamic, Engaging Education

We empower employees with knowledge about utilizing their benefits throughout the year. From extensive on-demand resources to timely seasonal communications, we help employees make the most of their accounts at every step.

## Why customers choose Lively



### Simple and modern

Onboarding is 100% paperless and can be completed in a matter of minutes. And our mobile app is highly rated among HSA providers.



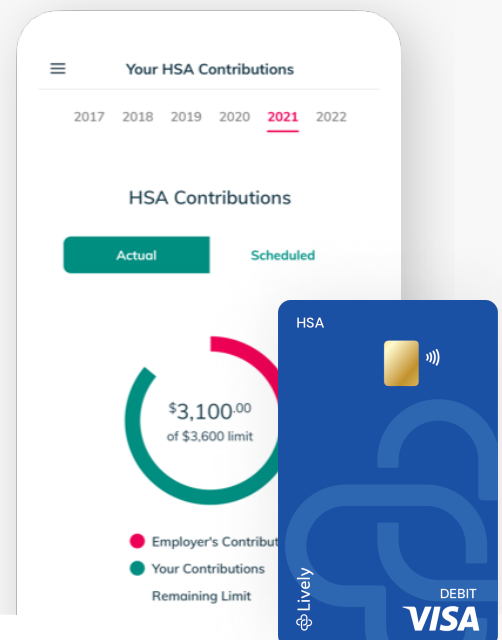
### Dedicated to your success

We go the extra mile for our customers. Every employer has a dedicated onboarding specialist who proactively engages with them. And our highly effective support team resolves 93% of issues in just one interaction.



### Ready for tomorrow

Data science is at the core of our technology, ensuring our ongoing innovation is informed and effective. That's why Lively is now the fastest growing HSA provider on the market with \$1B+ in assets.



## The benefits solutions provider that finally gets it right.

[1] Lively. "2021 Wellness and Wealth Report." May 2021.