

# Scalable HSA Innovation That Reliably Delivers

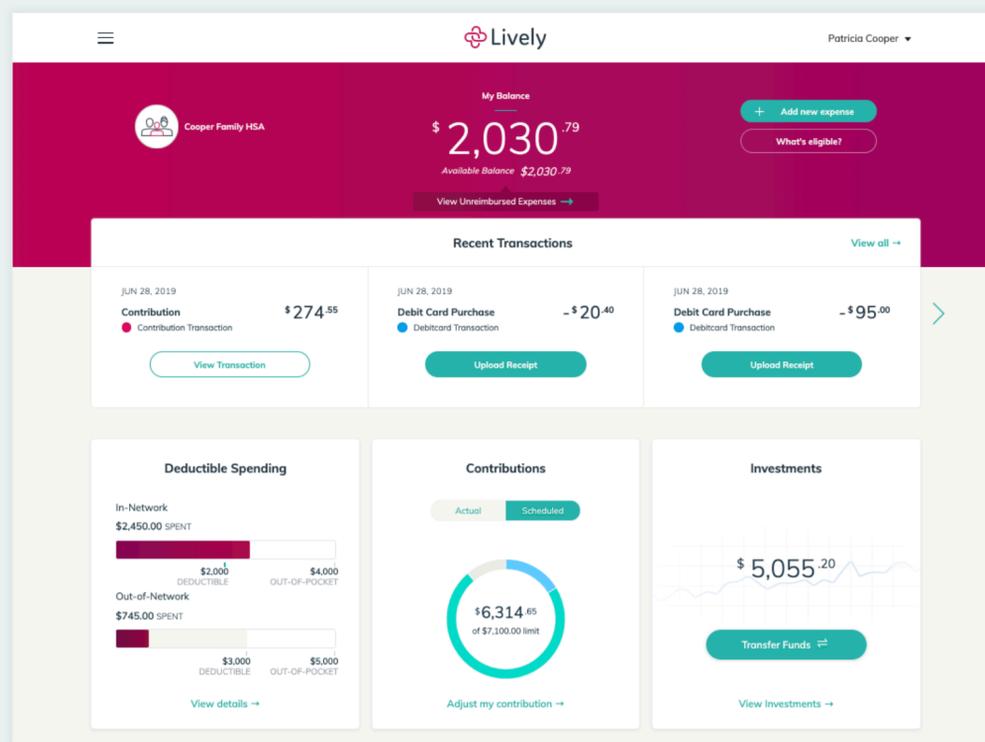
## Lively Health Savings Account (HSA)

With healthcare costs continuing to increase, many employers 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 rising popularity of health savings accounts (HSAs) 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 well account holders utilize their benefits.

**3 in 5**  
EMPLOYEES DO NOT UNDERSTAND THEIR HEALTHCARE BENEFITS<sup>1</sup>

## The Lively HSA Experience



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

- **Intuitive dashboards** – It’s always easy to review account status and actions needed at a glance, even on the go with our highly-rated native mobile apps.
- **Robust investments** – Account holders can invest their funds through low-cost solutions from TD Ameritrade 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



“TOP HSA PROVIDERS OF 2020”



“2019 VISA DPS CLIENT ACHIEVEMENT AWARD: EXCELLENCE IN INNOVATION”



“THE FORBES FINTECH 50: THE MOST INNOVATIVE FINTECH COMPANIES IN 2020”



“BEST HSA PROVIDERS FOR 2020”



# Show Employees You're On Their Side, Effortlessly

Lively lightens the burden of employer HSA administration by automating tedious tasks and bringing transparency to a complex ecosystem. And we only charge one single flat fee.



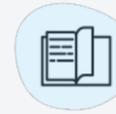
## Proprietary, Agile Technology

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

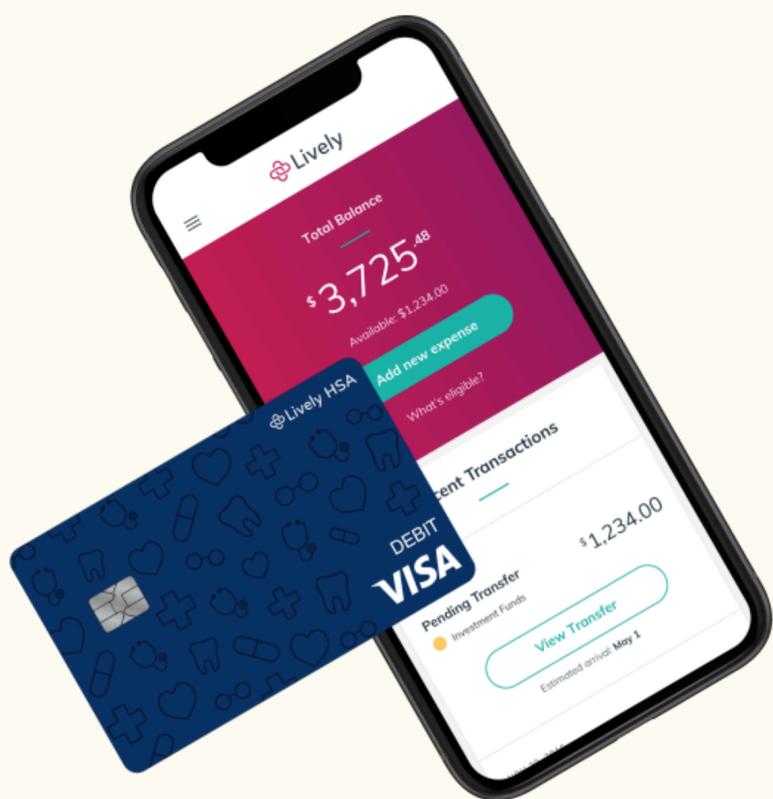
Our thoughtfully designed platform is simple and intuitive to use, on desktop or on the go. Each employer is assigned a dedicated onboarding specialist, and employees have access to our responsive and effective team of HSA experts.



## 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 apps (iOS and Android) are the highest rated among HSA providers.

### 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 \$250M+ in assets.

### 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.

No one asks for “good enough”  
...they just end up settling for it.

Isn't it time to offer an *exceptional* HSA?

### CONTACT

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