

Say “Good-Bye” to “Good Enough”

Meet Lively HSA

Healthcare has never been more top of mind for employees. Research shows that the average 65-year old couple retiring today can now expect to pay **\$300,000** on healthcare during retirement, up 88% since 2002.¹

Employers are increasingly offering High Deductible Health Plans (HDHPs) and Health Savings Accounts (HSAs) to balance both employee wellness and the bottom line. But many quickly learn that simply offering these benefits is not enough.

TRADITIONAL PROVIDER

vs.

THE LIVELY EXPERIENCE

Being surprised by hefty, hidden fees is a common and frustrating occurrence



Lively’s pricing is simple and transparent with no required fees for account holders

Lively has saved HSA account holders over \$4M in fees (and counting)

Troubleshooting often looks like long hours being bounced around ineffectual call centers



Each employer is paired with a dedicated, engaged Customer Success Manager ready to assist

93% of all account holder issues are resolved in just 1 interaction

Investment access is hindered by complex fee structures and cash minimum requirements



Lively account holders can begin investing from their first HSA dollar, no minimum required

Lively HSA account holders invest 5 times more than industry average²



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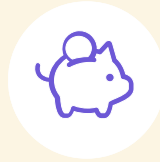
Default self-serve resources cover the essentials but leave nuanced questions unanswered



Education and resources are delivered year-round for personalized guidance

Lively's engaging "Welcome" email series reduced onboarding inquiries by 50%

Most HSAs are underutilized as the long-term savings vehicles they are meant to be



Lively account holders are prepared for future expenses with higher contributions

The average Lively HSA account balance is double the industry average²

Majority of HSA providers all white-label the same technology featuring limited capabilities



Lively's proprietary technology means ongoing innovation that maximizes the HSA experience

Lively maintains an NPS of 70+, compared to industry average of 16-34

Not All HSAs Are Equal

There are few benefits like the HSA, with its lifelong triple-tax advantages. But the lackluster industry standard experience limits the savings potential for employers and employees alike.

Lively is built by industry veterans and designed with the modern employer in mind. From intuitive designs and innovative features, to data-driven education and highly engaged support, Lively HSA delivers more for less.

Find out for yourself.



"TOP HSA PROVIDERS OF 2020"



"BEST HSA PROVIDERS FOR 2020"



"2019 VISA DPS CLIENT ACHIEVEMENT AWARD:
EXCELLENCE IN INNOVATION"



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

[1] Fidelity. "20th Annual Retiree Health Care Cost Estimate." May 2021.
[2] Devenir. "2020 Year-End HSA Devenir HSA Research Report." March 2021.

