

# Top 10 Reasons for a Lively HSA

Lively is a modern Health Savings Account (HSA)

## We Deliver a Better HSA Experience

### Our Customer First Solution

Lively is an intuitive, simple, and independent HSA. We created beautifully designed software with a simple and intuitive user experience to help consumers get the most out of their HSA. This includes easy set up (less than 5 minutes), paperless account management, and transparent pricing.

#### 5 minute Sign Up / Transfer

Lively is a streamlined, digital way to manage a health savings account. Employees can seamlessly rollover or transfer their HSA during the enrollment process or at any other time. It really is that easy with our modern technology.

#### Payroll Sync

We will work with Employers to set-up appropriate file feeds with your payroll and/or benefits provider for both enrollment and contributions. If applicable, you can choose to sync your online payroll system to Lively allowing you to streamline company contributions and automate each employee's pre-tax deductions.

#### Security

The only thing more valuable than money is personal information. We keep them both safe and secure. All Lively HSAs are backed by FDIC insurance (up to \$250,000 per HSA account). HSA investments funds carry SIPC insurance. All personal information is out of reach for unauthorized access.

#### 100% Paperless

Time is precious and nobody wants to waste it filling out paperwork. Lively has designed an intuitive experience that will leave employers and employees pleasantly surprised. Lively can automatically create new accounts for eligible employees based on the information provided to us either by the employer or through a file feed.

#### Customer First

From onboarding to tax season to continued HSA education we designed our HSA so you can get the answers you need, how you want them - on-demand, chat, or phone, we can help you with everything HSA (and benefits) related. Because we value service, we don't outsource our Member Support team.

#### Carrier Neutral

Working with an independent HSA provider, means you can switch HSA providers once and never have to switch again regardless if you change your healthcare provider or eligible health plan. Trust the experts!

## #1 Rated HSA

As a testament to our care for our clients, Lively has quickly risen to be the #1 HSA provider on HSASearch.com (HSASearch.com is part of Devenir, the industry leading research firm). Even as Lively has grown, we have maintained our #1 ranking. Feel free to Google "Lively HSA" and take a look for yourself.



#### Proprietary Industry First Technology

We built our technology from the ground up; we do not operate at the mercy of other partners. Building and owning our technology allows us to be nimble and flexible. We aren't limited by another provider's software, but rather we have create a customer first design and modernized the HSA experience for both employers and employees.

#### HSA Experts

Our entire team are HSA experts. We are here to pass that information, as needed, on to you and your employees. Call, chat, email, or explore on your own, whatever works best for you.

#### Concierge Service

Our HSA was designed to be intuitive. Our Member Support team was designed to be available. We extend that further to our Employer clients with a dedicated account manager. All of that is backed up with our on-demand self-service resources including HSA calculators, detailed FAQs (and answers), and a real-time list of IRS approved eligible expense items.