

2021 Marketing & Communications Calendar

Email Campaign Topics



5 Stages Funding
Webinars
Annual Tax Statements



5 Stages Funding
Webinars
Investing / HSA Long-term savings
FSA Education / Spend Down

Bank statement monthly email or quarterly mailed notifications
Account activity triggered email communications



5 Stages Funding
Investing / HSA Long-term savings



5 Stages Funding
Webinars
FSA Education / Spend Down
HSA Day

*2021 calendar subject to change

2021 Marketing & Communications Plan



EMPLOYER RESOURCES

Openenrollment123.com

Materials to promote the accounts, educate, create awareness and help employees select their benefit options

- ✓ Videos
- ✓ Online tools
- ✓ Guides
- ✓ Flyers

Open Enrollment Campaign

4 part email series that provides tools and resources to share with employees

Regulatory & Legislative

Research & Thought Leadership

EMPLOYEE COMMUNICATIONS

Welcome kit

Includes the card(s), account specific information, activation instructions and tips on how to maximize their account

Sent 7-10 days after account opened

Educational Welcome Series

3 part email series that welcomes and educates new account holders

HSA only; first email sent 2-3 weeks after account opened and then weekly

Targeted Marketing Email Campaigns

- ✓ Education
 - HSA/FSA Webinars
 - HSA/FSA Optum Bank Academy Courses
 - FSA Spend Down
 - Claim filing & receipt upload
- ✓ Funding
- ✓ Investing
- ✓ New product launches

Social Media

- ✓ LinkedIn
- ✓ Twitter
- ✓ Facebook
- ✓ Paid search campaigns

Transactional Communications

- ✓ Account activity triggered communications
- ✓ Forms & documents
- ✓ Bank statements
 - Monthly email notification
 - Quarterly mailed notification
- ✓ Annual tax statements

