

2020 Marketing & Communications Calendar

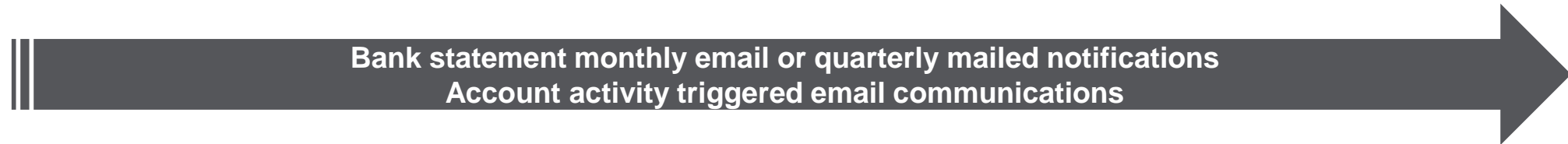
Email Campaign Topics



Microsegmentation Funding
Webinars
Optum Bank Academy
Add a Beneficiary
New Product Launches
Annual Tax Statements



Microsegmentation Funding
Webinars
Investing
FSA Educational / Spend Down
Health Finance Ed Center
New Product Launches



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*2020 calendar subject to change

2020 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
- ✓ Investment
- ✓ 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

