

Financial Services Communication Calendar: Core (UHC and Optum Direct)



Account holder communication activities and timelines are subject to change.

Communication	Q1	Q2	Q3	Q4	OVERVIEW
B2C marketing campaigns:					
Welcome Educational Series	●—————●				A series of 3 emails that welcomes and educates new account holders regarding their HSA.
Targeted Account Holder Campaigns	●- - - - -●				Targeted campaigns are sent throughout the year on an ad hoc basis. Select campaigns apply the Health Finance Journey Model segmentation strategy.
Health Savings Newsletter	●—————●	●—————●	●—————●	●—————●	Quarterly e-newsletter sent to account holders providing timely and important reminders about HSA updates and features. Newsletters apply the Health Finance Journey Model segmentation strategy.
HSA Webinars	●—————●	●—————●		●—————●	Public webinars feature a 20/20 format with the first 20 minutes dedicated to presentation and the following 20 minutes reserved for live Q&A. Invitations are sent to employers and account holders by email to encourage participation.
Transactional Communications	●—————●				Includes bank statements, tax statements, etc.
B2B2C marketing campaigns and resources:					
Two-Minute Answers				●—————●	A four week employer email campaign that provides resources to distribute to their employees. These communications are designed to support employer's direct efforts to help their employees during open enrollment.
Online resources	●—————●				HSA, FSA, HRA and Transportation educational resources including videos, flyers, tools, and demos for employers to distribute. These resources can be found online at openenrollment123.com .

Health savings accounts (HSAs) are individual accounts offered or administered by Optum Bank®, Member FDIC, and are subject to eligibility requirements and restrictions on deposits and withdrawals to avoid IRS penalties. State taxes may apply. Fees may reduce earnings on account. Flexible spending accounts (FSAs) and health reimbursement accounts (HRAs) are administered by OptumHealth Financial Services and are subject to eligibility and restrictions. The content of this communication is not intended as legal or tax advice. Federal and state laws and regulations are subject to change.