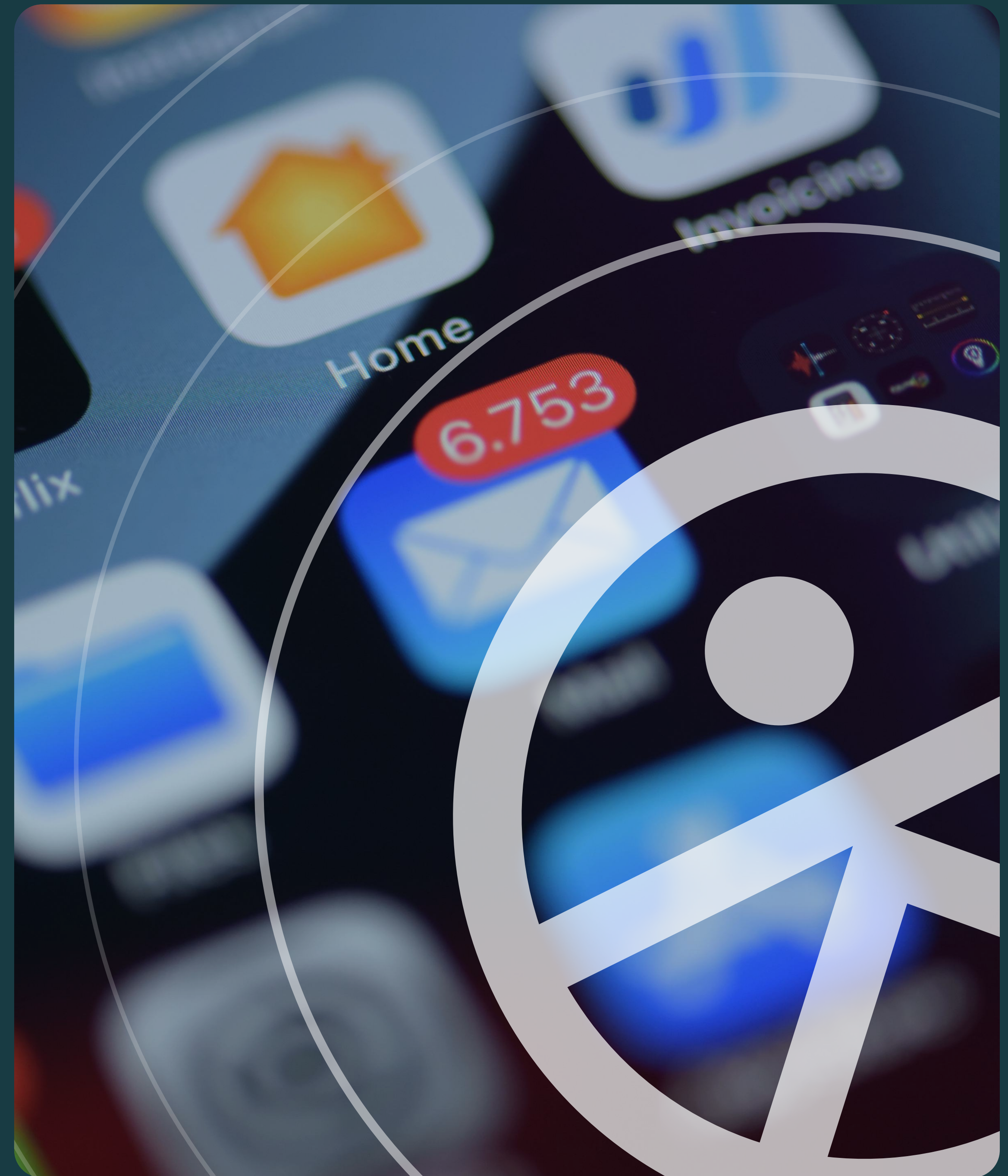


Q4 Playbook: Health Tech



Purpose

Q4 is crucial for:

- **Raising HSA / FSA awareness** to increase available funds for 2025
- **Driving spend** before funds expire EOY

In this guide, you'll find recommended campaigns for October - January to help you educate consumers and maximize their spending.

Our goal is to make **Truemed** your most impactful Q4 marketing tool!

Key Dates

October 21-25

**HSA / FSA
Education
Week**

November

**Open
Enrollment**

Educate on HSAs/
FSAs. Boost your
2025 success.

December

Use It or Lose It

Funds expire EOY.
Drive revenue.

January

**Funds
Replenished**

New Year, New
You.

October

HSA/FSA Awareness Week

Overview

Truemed is excited to announce its inaugural **HSA/FSA Awareness Week**, running from October 21-25, to spotlight products that help prevent and reverse chronic conditions.

On Thursday, **October 25th**, we will focus on the importance of **Red Light, Sauna, Cold Plunge, and other Health tech** and its many benefits.

Sample Bullet Points + CTAs:

Allocate funds to HSA/FSA during upcoming period, and save up to 30% on [Product Names] in 2025

[Product Category] are effective interventions: Learn more about how our products can heal and keep you healthy

Plan for 2025: Max out your HSA/FSA and save an average of 30% on our products!

Open enrollment starts soon – choose an HSA eligible plan

Recommended Campaign

- 1 10/22:** [Your Product] is Medicine: Save up to 30% with [Merchant Name]
- 2 10/28:** Save the date for Open Enrollment - Plan your savings today!
- 3 10/31:** Open Enrollment starts TOMORROW- Don't miss out on up to 30% savings!

November Open Enrollment

Overview

Consumers select their insurance plan for 2025 during **open enrollment** which begins on November 1. If they choose an HSA-eligible plan (and max it out), those pre-tax funds can be used on your eligible products, resulting in 30% average savings.

Since HR emails are often overlooked, a dedicated campaign educating consumers about HSAs/FSAs, and encouraging them to plan their HSA/FSA spend with you, is crucial for 2025 success.

Sample Bullet Points + CTAs

When you are making your health insurance selections, max out your HSA or FSA

Products/services from [Merchant Name] are eligible for HSA/FSA spend with Truemed

Paying for [Product Names] with pre-tax money = 30% average savings

Recommended Campaign

- 1 11/1:** Future-proof your health with [Merchant Name]: Open Enrollment is here!
- 2 11/14:** Plan your big purchase- Max out your HSA today!
- 3 11/30:** Drained your HSA/FSA funds on Black Friday? Plan your 2025 savings today.

December

Use It or Lose It

Overview

FSA funds expire at the end of December, making year-end an great time for dedicated Truemed messaging. If these funds aren't used, they're lost.

Highlight this deadline to drive additional revenue and remind consumers to make the most of their FSA for 2024.

Sample Bullet Points + CTAs

If you don't use your FSA funds this month they expire. Buy [Product Name] today.

Get [Product Name] as low as [\$X] before the year is up (*calculate average savings of 30%*)

Recommended Campaign

- 1 12/11:** Use it or Lose it: Spend your FSA with [Merchant Name] and save up to 30% before it's gone!
- 2 12/20:** This season, give yourself a gift! Buy [Product Name] with your FSA before your funds expire.

January

New Year, New You

Overview

In January, HSA/FSA funds are replenished, giving some of your consumers a tax-free boost of >\$4,000, depending on how much they allocated. This is also a prime time for spending in the **Health Tech** category, as people set New Year's resolutions and focus on their health.

Tailor your messaging accordingly and capture revenue early in the year.

Sample Bullet Points + CTAs:

Truemed enables you to purchase our products/services at a significant savings by unlocking HSA/FSA spend

You have new funds available. Use them now and save an average of 30%

Start your year off on the right foot.

Recommended Campaign

- 1/1:** New Year, New You! Save up to 30% when you pay with HSA/FSA
- 1/7:** Thinking about a [Product Name] purchase to kick off the year? Buy today for as low as [\$X].
- 1/14:** Your HSA/FSA funds are here! Spend them now with [Merchant Name] and save up to 30%

Promotion Best Practices

1

Be direct

Assume this is a new concept to your consumers.

Emphasize:

- **What** this means: ~30% savings
- **How** to do it
- **Who** is eligible

2

Be repetitive

Deliver the message multiple times, across multiple channels, throughout the buying journey.

3

Get creative

Try different channels. Target different cohorts with different messages. Integrate the HSA/FSA message into other campaigns. See what works for your audience.



Thank You

Feedback? Questions?
merchants@truemed.com