HealthEquity®

{ BRAND *book* }



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HealthEquity

BRAND BOOK

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about us

HealthEquity is dedicated to helping Americans thrive in today's complex healthcare system by empowering health savings and helping employers manage benefit costs.

HealthEquity is the largest non-bank custodian with billions of dollars in custodial assets. We provide account-based health plan services to millions of members; this includes health savings accounts (HSAs), flexible spending accounts (FSAs), health reimbursement arrangements (HRAs) and health incentive accounts (HIAs). We are one of the top healthcare account administrators in the country, serving more than 34,000 employers and 87 health plans nationwide.

Our industry-leading solution enables millions of members to build health savings for life, helping them effectively navigate their healthcare accounts. We provide useful support tools and resources, such as an online portal, mobile app and a team of highly-trained member services specialists that is available every hour of every day.

HealthEquity offers a complete line of integrated accounts

- Health savings accounts (HSAs)
- Health reimbursement arrangements (HRAs)
- Flexible spending accounts (FSAs)
- Health incentive accounts (HIAs)
- Retirement accounts (401(k)s)

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BRAND OVERVIEW

Section 01

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BRAND OVERVIEW

A brand is more than just a logo. Branding is a combination of elements, such as colors, typography, voice and imagery that become the personality of the company and help identify it in the market. Solid and consistent brands build trust and create a competitive advantage—increasing a company's ability to succeed.

Using the Brand Book

The entire HealthEquity team is responsible for ensuring that our brand remains strong. This Brand Book provides guidelines to follow so that the brand is consistently executed. We recommend familiarizing yourself with the HealthEquity brand and following it when creating anything on behalf of the company. If you are creating a presentation or other formal documents that contain the HealthEquity logo and will be shared with members or partners, you must submit it for a complete Marketing review; this includes a review by the Compliance team.

For more information or if you have questions about what should go through this process, contact the Marketing team at:

marketingteam@healthequity.com

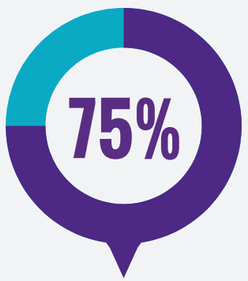
First impressions are

94% DESIGN RELATED



People form an opinion of your website within **0.05 seconds**.

Source: https://www.sweor.com/firstimpressions



of users admit to making judgements about a company's credibility based on their website's design.

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Branding our buildings

The HealthEquity campus is an extension of our brand and is reflected in the interior design of the buildings. We often have visitors and partners touring the facilities, so it is important that the fixtures and other items on display are brand-compliant. This includes posters, artwork, furniture and other visible items. It is our policy that we do not tape or hang any communication outside of the designated areas, such as:

- Elevators
- Bathroom stalls
- Break rooms

For approval to display information, contact the Marketing team.

Please note

Although some rules presented in this guide are fixed, they are not intended to be limiting. There is scope for creative expression within the context of these guidelines, provided that consistency and simplicity are maintained.





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OUR LOGO

Section 02

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OUR LOGO

When using the HealthEquity logo, please follow the guidelines in this section. The HealthEquity logo is one of the company's most valuable assets. Its value increases as it is used properly and consistently. The logo is the core element of visual identity. It should be seen on everything from brochures and booklets to advertisements and promotional materials.

HealthEquity icon

In 2013, the combined caduceus and dollar sign icon was developed to brand HealthEquity's mobile app. Since then, it has been in the background of various marketing materials. In light of our new 2018 strategic mission of connecting health and wealth, this icon has become even more relevant. We use this symbolic icon to represent our conviction to this union and it can be used on its own without the HealthEquity name.









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OUR LOGO





Official logo

The official HealthEquity logo includes the HealthEquity name and icon in one of two approved variations. These formats should be used on official documentation and external-facing materials. The stacked version of the logo is preferred when space allows while the horizontal version can be used to accommodate limited vertical space. The logos can be used in full color format featuring purple and teal in most instances. It can also be used in the color versions as shown on the following page.

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When placed on purple the text should be in white, while the icon should be in teal with a white caduceus.

When placed on teal the text should be in white, while the icon should be in purple with a white caduceus.

When placed on any other dark color, the text and icon should be in white with a knocked out caduceus.

The black version of the logo should be used only when required for b&w printing or when necessary for promotional items

Legacy logos

In July 2018, HealthEquity introduced the official logo with the caduceus and dollar sign icon. Many legacy documents contain the older logo with no icon or with 'Building Health Savings.' While these are no longer our preferred logos, they are still relevant and can be used until these materials are updated, at which point the official logo should be used. Additional costs should be avoided when updating to the new logo. Any logos older than five years that include the four boxes should immediately be updated even if costs are incurred.

HealthEquity®

HealthEquity®
Building Health Savings℠

Logo files & formats

Logo files are available for download on the Marketing SharePoint page.

Available file formats and how they should be used include:

- EPS: all professionally-printed applications
- JPG: Microsoft programs, online usage
- PNG: online usage



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Guidance for correct logo use

Here are some important requirements when using the HealthEquity logo:

- You cannot edit or modify the logo.
- The logo must always have the registered symbol (®).
- The icon must always have the trademark symbol (TM).
- The logo requires a surrounding area clear of any other dominant graphic elements or text. The white space must be equal to the width of the capital ‘H,’ as shown in the images below.





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Department/team logos

Only official logos can be used. Logos for individual teams and departments are not allowed. When used properly, the HealthEquity logo unites the company’s departments. By providing a uniform logo wherever visual identification occurs, it projects the quality that HealthEquity has come to represent. See examples below for how to incorporate department names into promotional items and other various materials.

CORRECT



INCORRECT



Department name and HealthEquity logo must be separate. Placing them together creates brand confusion.

DEPARTMENT EMAIL HEADER



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Examples of incorrect logo use

Do not use the retired HealthEquity squares logo.

Do not remove or change placement of the logo's registration (®) or icon's trademark (TM) symbols.

Do not distort or stretch the logo.

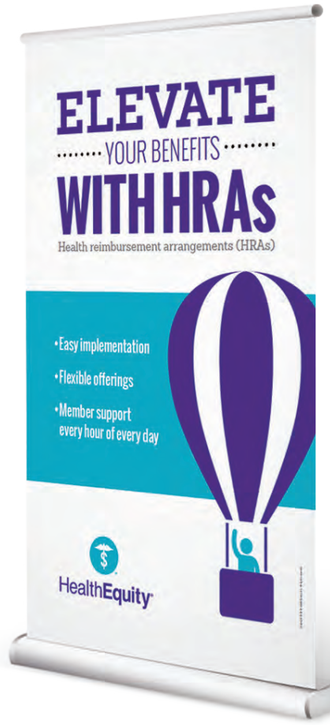
Do not use a full color logo on a colored background.

Do not use the logo as a watermark.

Do not use a gradient within the logo.

Examples of correct logo use





LOGO TIMELINE

HEALTHEQUITY

HealthEquity™

HealthEquity™

HealthEquity®
Building Health Savings℠

HealthEquity®
Building Health Savings℠

HealthEquity®

HealthEquity®

HealthEquity®

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OUR LOGO



COLORS

Section 03

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COLORS

Our corporate colors are a major part of our brand identity. Using our colors correctly creates a unified and consistent brand throughout the organization and ensures that the HealthEquity brand remains instantly recognizable in everything from promotional materials to tradeshows.

Corporate colors

The primary colors of our brand are deep purple and teal and should be used as the dominant colors in all marketing materials. The colors blue and green are accents and should be used sparingly for subheadings and some graphic elements. Tints of these colors are available for marketing use only. Turn the page for details and examples.

Five acceptable grays (5, 10, 15, 20 and 40% black) have been chosen; these should only be used for accents and some graphics. The darker 70% should be used only for textual elements such as disclaimers and other small type.

> Green is *never* the answer.
>
> - Nikki Lusty

PMS 268 C
CMYK: 82, 98, 0, 12
RGB: 89, 44, 130
Hex: #592c82

PMS 3125 C
CMYK: 83, 8, 20, 0
RGB: 0, 170, 198
Hex: #00aac6

PMS 660 C
CMYK: 91, 53, 0, 0
RGB: 0, 112, 185
Hex: #0070b9

PMS 362 C
CMYK: 72, 22, 89, 6
RGB: 83, 147, 79
Hex: #53934f

CMYK: 0, 0, 0, 5
RGB: 241, 241, 242
Hex: #f1f1f2

CMYK: 0, 0, 0, 10
RGB: 230, 231, 232
Hex: #e6e7e8

CMYK: 0, 0, 0, 15
RGB: 220, 221, 222
Hex: #dbdbcde

CMYK: 0, 0, 0, 20
RGB: 209, 211, 212
Hex: #d1d2d4

PMS cool gray 6
CMYK: 0, 0, 0, 40
RGB: 167, 169, 172
Hex: #a7a9ab

PMS cool gray 10
CMYK: 0, 0, 0, 70
RGB: 109, 110, 113
Hex: #6d6e70

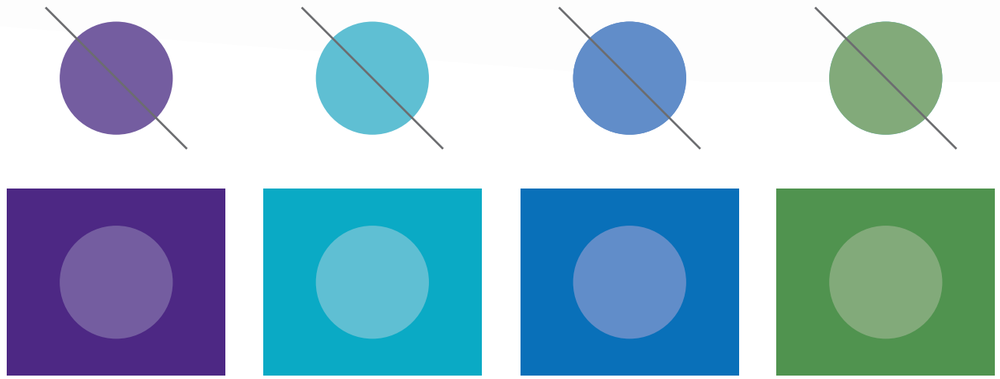
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Using tints

Tints of our four colors are only available for marketing use. They should be used sparingly as a graphic element layered over a solid of the same color (i.e. a tint of teal should only be placed on a solid teal background). See examples below.





Web and print colors

The specified PANTONE® swatches are the basis for the HealthEquity brand colors. Color values change depending on use and are listed on the previous page.

Web colors

The RGB and hex codes listed on the previous page can be used interchangeably for web applications.

Print colors

The CMYK formulas specified are the preferred colors for printed materials. PANTONE® spot colors may also be used for a more perfect match, but this must be looked at on a per project basis. For more information, contact the Marketing team at:

marketingteam@healthequity.com

Remember...

The colors blue and green should be used sparingly on corporate materials. They should be treated as accent colors and not the dominant color in a piece.

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TYPOGRAPHY

Section 04

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TYPOGRAPHY

The typography used in the corporate logo and in other materials plays a large part in establishing the visual identity of HealthEquity. The preferred fonts are Helvetica Condensed, Oswald and Sanchez Slab. Voltage is to be used in HealthEquity collateral only by approved teams. If you do not have access to these fonts, use Arial.

Primary body typeface

Helvetica Condensed is the primary body typeface. It should be used at 9 pt font with 13 pt leading.

Helvetica - Condensed

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

Helvetica - Bold Condensed

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

Helvetica - Bold Condensed Oblique

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

Primary heading typeface

Oswald is primarily used for headings, subheadings and large type. Do not use a font size smaller than 12 pt for headings.

Oswald Light

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

Oswald Book

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

OswaldRegular

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

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Primary subheading typeface

Sanchez Slab is primarily used for subheadings. It can also be used in folios and lists/charts.

Sanchez Slab - Extra Light

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

Sanchez Slab - Light

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

Sanchez Slab - Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

Sanchez Slab - Italic

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

Sanchez Slab - Semibold

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

Sanchez Slab - Bold

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

Sanchez Slab - Bold Italic

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

Marketing limited use typeface

Voltage is available for **limited use only** in marketing materials and the website. This font is to be used sparingly to emphasize single words in headlines and can be used as a graphical element or large type. Voltage should never be used for full sentences.

Voltage - Regular

ABCDEFGHIJKLMNOPQRSTUVWXYZ
abcdefghijklmnopqrstuvwxyz
1234567890

Aa

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PHOTOGRAPHY & ILLUSTRATION

Section 05

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PHOTOGRAPHY

Photography adds a human element and emotion to the brand. Primarily, only images of HealthEquity employees and members can be used. We use images of real people to establish approachability and authenticity. People should be photographed in a natural setting. The use of stock photography should be avoided.

All photography must be approved by the Marketing team. For use of photography, contact the Marketing team at:

marketingteam@healthequity.com

Photography in print, web and mobile

The format of the image changes depending on how it is used.

Print

Printed images should be produced at 300 DPI at 100%. DPI stands for 'dots per inch' and is a measure of the resolution of the image (higher DPI represents a higher resolution image).

Web and mobile

Images for the web should be produced at 72 DPI at 100%. Images used for mobile applications should refer to the resolution and pixel density of the intended device and adhere to best practices of the human interface guidelines appropriate to the operating system.

Photography style guidelines

Images should feel relaxed and natural rather than staged.

Images should convey professionalism.

Ensure the content does not offend or alienate.

Avoid symbolic images, as they may be misinterpreted.

Avoid racial and gender stereotyping.

Use a variety of men and women and ethnicities.

Use images that convey the diverse nature of the company.

Adhere to guidelines when co-branding.











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ILLUSTRATION

HealthEquity uses an illustration style that is easy to understand. We use simple illustration and graphic elements to show what we do and bring out our personality. Any questions on illustration and imagery should be directed to the Marketing team at:

marketingteam@healthequity.com

Icons

Our icons are flat and two-dimensional with clean defined lines. They should contain minimal detail and no more than two colors. A library of approved images is available on our SharePoint page. These can be used for general purposes without Marketing's approval. The use of other icons must be approved by the Marketing team.

Examples



Minions

We use a variety of illustrated people we fondly refer to as 'minions.' This term is not derogatory, but rather meant to express our fun purple culture and what we do best-serving our customers.

Choosing the correct minion

Minions should not have clothing accessories, such as ties, hats or glasses.

Our minions need to be a simple accent to our brand rather than the main focus.

Only use minions created by illustration artist, 'Leremy.'

Leremy has created a wide range of minions representing various activities available through Getty Images. The Marketing team has stock of all minions created by Leremy, please contact them for assistance at:

marketingteam@healthequity.com



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meet *our* minions



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OUR VOICE

Section 06

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OUR VOICE

HealthEquity uses an active voice that is clear and conversational. We use a friendly tone and simple words to describe what we do. We begin each communication by answering the 'why,' which explains the purpose of our message. Messaging should be concise while including all of the necessary details. Maintaining a strong brand relies on a distinct voice that is consistent for all audiences across all communication channels.

GOOD example

Dear [Member Name],

Adding beneficiaries to your account allows your health savings account (HSA) dollars to pass to your loved ones at the time of your death. This is one of the most important things you need to do with your HSA.

How to add a beneficiary

You can add beneficiaries to your HSA profile in two ways:

Online:
Visit www.MyHealthEquity.com to log into your HealthEquity member portal. Hover over 'My Account,' then 'Profile' and select 'Profile Details' where you can add/edit beneficiary information.

Fax or mail:
The 'Docs & Forms' section of the member portal includes the 'Beneficiary Designation Form.' It can be downloaded, filled, printed and mailed or faxed to HealthEquity using the address or fax number provided on the form.

If you have any questions, we are available every hour of every day at 866.346.5800 to assist you.

Thank you,

HealthEquity Member Services

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HealthEquity is located at 15 W. Scenic Pointe Dr., Draper, UT 84020

BAD example

Dear [Member Name],

Have you added a beneficiary to your account? If you die, you will want your money to go to someone you care about. You can change or add beneficiaries as frequently as you like.

How To Add A Beneficiary

Don't worry, adding a beneficiary is easy. We offer 2 ways to add beneficiaries to your HSA profile:

Online:
Go to healthequity.com to log in to your HealthEquity member portal. Go to My Account>Profile>Profile Details where you can add/edit beneficiary information.

Fax or Mail:
The "Docs & Forms" section of the member portal houses a Beneficiary Designation Form. It can be downloaded, filled out using your keyboard, and then printed. You can then mail or fax the form back to HealthEquity using the address or fax number provided on the form.

Our expert Member Services Team is available 24 hours a day, 7 days a week at 1-866-346-5800. They are ready to help you understand and manage the financial side of your health care. Please contact us with any questions.

Sincerely,

Your HealthEquity Member Services

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OUR VOICE

Copy guidelines

We follow the guidelines set in the AP style guide, with very few exceptions. Below you will find rules that you are required to know, that you need to know and that are nice to know when creating content. If you have any specific questions that are not outlined below or not in the AP style guide, please reach out to the Communication team for assistance.

REQUIRED to know

These are legal **requirements** that you must follow. If you have any questions, contact the HealthEquity compliance team.

Rules	Correct	Incorrect
HealthEquity HealthEquity's name should always be spelled out rather than using the acronyms.	HealthEquity	HQY, HEQ
Debit card name Use the full name of the debit card on the first instance in a document.	**HSA:** HealthEquity® Visa® Health Account Card **FSA/HRA:** HealthEquity® Visa® Reimbursement Account Card **Rewards:** HealthEquity® Visa® Prepaid Card	HSA debit card, FSA/HRA debit card
Administrator vs. custodian When referencing HealthEquity as an organization, use the correct classification.	Custodian	Administrator
Deposit vs. contribution As a third-party administrator, we accept contributions and deposit those funds into other institutions. We are not legally allowed to say that we accept deposits.	Contribution	Deposit
Trademark and registered symbols The HealthEquity name requires the registered symbol on the first instance. Other items that are trademarked need to have the symbol on the first instance.	HealthEquity® Balance Booster™	HealthEquity Balance Booster
Copyright A copyright must be included on all official HealthEquity communications. In mass emails, also include the HealthEquity address after the copyright.	Copyright © 20XX HealthEquity, Inc. All rights reserved. HealthEquity is located at 15 W. Scenic Pointe Dr., Draper, UT 84020	Copyright HealthEquity

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NEED to know

These guidelines **must** be followed to ensure that all HealthEquity communications are consistent.

Rule	Correct	Incorrect
No contractions Spell out all contractions.	Cannot, will not	Can't, won't
No Oxford comma Do not use a comma before the final item in a list of three or more items.	FSA, HRA and HSA	FSA, HRA, and HSA
Use sentence case Only capitalize the first letter of the first word in a heading or title.	HealthEquity member guide	HealthEquity Member Guide
Job titles Capitalize titles when they refer to a specific person, not when they refer to an occupation.	Chief Executive Officer Jon Kessler	Jon Kessler is the Chief Executive Officer
Footnotes Use superscript numbers, not asterisks.	Tax-free[1]	Tax-free*
Healthcare This was a stylistic choice that must be followed. Healthcare should be one word.	healthcare	health care
No jargon or internal lingo Use universal language that people outside of our industry will easily understand.	Qualified medical expenses Account manager Contribution processor Plan comparison tool	QME PRM/AE C3PO PCT
Phone numbers Use periods instead of dashes and leave out the leading number one.	866.346.5800	1-866-346-5800

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NICE to know

These are stylistic guidelines to help maintain consistency with the HealthEquity voice, look and feel.

Rule	Correct	Incorrect
Single quotes When referencing specific pages, tabs or buttons use single quotation marks around the entire item.	'My Account'	"My Account," **My Account**
Referencing time When providing hours of operation, use the 'Central' time zone, the hour numeral, and am/pm should be lowercase with no periods.	7 am – 7 pm Central	7:00AM – 7:00PM MST
Questions in communications Never begin a communication with a question.	There is still time to contribute to your HSA.	Did you know you can still contribute to your HSA?
Spell out numbers below 10 Use numerals for numbers 10 and above.	One, two, three	1, 2, 3
Periods on bullets All bullets in a list should be consistent, meaning they are all a complete sentence or they are all a statement. Use periods on bulleted lists that include complete sentences.	• Transfer your HSA to HealthEquity. • Update your paycheck contributions.	• Transfer your HSA to HealthEquity. • Paycheck contributions
Member services availability We do not use numbers to describe member services availability.	Every hour of every day	24/7/365

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COLLATERAL

Section 07

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COLLATERAL

The following pages contain examples of HealthEquity collateral and demonstrate the proper use of our brand guidelines.



Member introduction brochure





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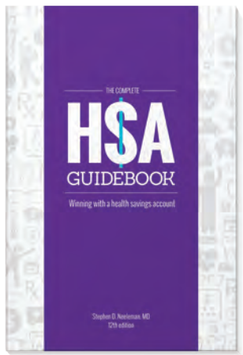
COLLATERAL

Open enrollment tool boxes





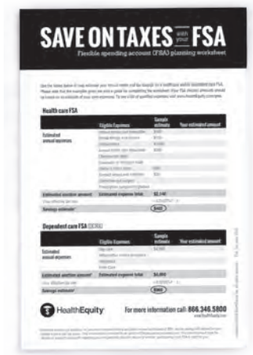
HSA:







FSA:







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Various external collateral



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PROMOTIONAL ITEMS

Section 08

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PROMOTIONAL ITEMS

Promotional items are used as giveaways either internally or externally. When creating a promotional item, use the primary logo without any other text around it. Department names or other design elements should be placed in a second location, such as the side or back. All items branded with the HealthEquity logo must be approved by Marketing. Items in this section are examples of promotional items that can be created. For options or to place an order, contact the Marketing team at:

marketingteam@healthequity.com



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TRADESHOWS

Section 09

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TRADESHOWS

Tradeshows are a good opportunity for HealthEquity to showcase our brand and promote our services within the healthcare industry. All tradeshow design and messaging should be approved by the Marketing team.

Responsibilities of the tradeshow owner

All tradeshows will have a designated tradeshow owner. This person is responsible for planning all event details and ensuring that the event runs smoothly, including:

- Scheduling and hosting tradeshow planning meetings
- Assembling the necessary tradeshow planning committee
- Reserving the booth space in advance (should work with Marketing to plan booth size and location within the tradeshow floor plan before making the reservation)
- Payment of booth space
- Registration of all HealthEquity tradeshow attendees
- Coordinating travel and hotel information with other HealthEquity attendees
- Coordinating booth messaging and design with the Marketing team
- Planning outside events (the marketing team is available to support)
- Ensuring that any necessary invitations are created and sent
- Ensuring any promotional items being displayed are available and in display condition for the event

For both regional and national shows, the Marketing team is available to support messaging, graphics, media interaction, etc. All booth design planning should be coordinated with the Marketing team as early as possible, and all designs must be approved by the Marketing team.

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PRESENTATION MATERIAL

Section 10

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PRESENTATION MATERIAL

The HealthEquity PowerPoint templates should be used for all presentations and can be found on the Marketing SharePoint page. Presentations should only use Arial or Helvetica fonts as well as approved graphics and brand colors.



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Example slides

Section header



Sample layout



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BUSINESS COMMUNICATION

Section 11

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BUSINESS COMMUNICATION

HealthEquity has approved items for business communication, such as business cards, email signatures and letterhead. The consistent use of these items unifies the company and supports the HealthEquity brand.

Letterhead and envelopes

Brand-compliant templates have been created for business communication and can be found on the Marketing SharePoint page. In all templates the fonts Helvetica or Arial should be used. The use of other fonts is not permitted.

Business cards

Business cards are used to exchange professional introductions. Employees who interface externally are expected to maintain HealthEquity business cards.



To order business cards,
visit the Marketing SharePoint page and complete the business card order form.

Member communication

HealthEquity communicates with our members through email and message center. To view the approved messages and system generated emails, visit the Communications SharePoint page. To request a custom communication, complete the Communication Request Form also located on the SharePoint page.

Email signatures

HealthEquity has an approved email signature that should be used internally and externally. The use of logos, images and animations within the signature are against company policy. Images increase the size of data being transmitted and do not always display correctly for the receiver. Below is the approved email signature. For detailed instructions on how to create your own, visit the Marketing SharePoint page.

Name
Title

HealthEquity
15 W. Scenic Pointe Drive, Suite 100
Draper, UT 84020

O: 801.555.1234 M: 801.555.6789
email@healthequity.com
www.HealthEquity.com

Follow us: Twitter Facebook LinkedIn

Email guidelines

No logos, images, taglines, slogans or quotes

No environmental messages to discourage the printing of emails

No fancy script fonts

No colored text, except in the HealthEquity name

No social media or other logos

No background images or patterns

No messages regarding personal information,
i.e. “Steve is enrolled in cake decorating class and won’t be here on Mondays.”

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BUSINESS COMMUNICATION



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ELECTRONIC MEDIA

Section 12

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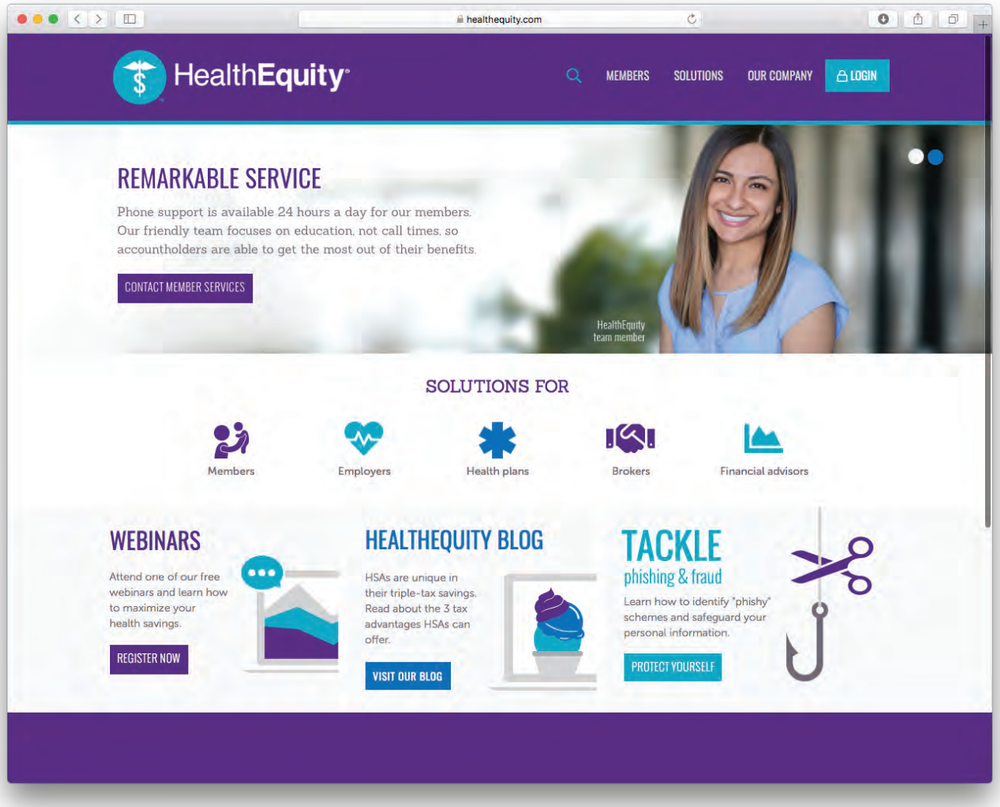
ELECTRONIC MEDIA

The Marketing team is responsible for maintaining the brand presented through electronic media. Change requests, excluding the member portal, should be sent to:

marketingteam@healthequity.com

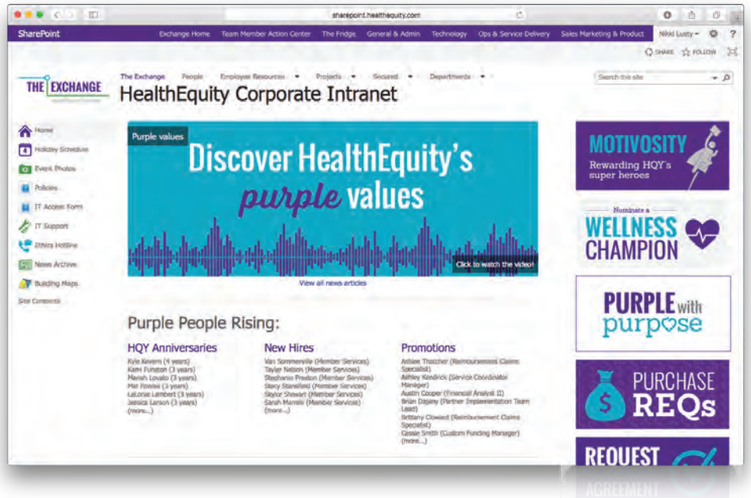
Public website

The HealthEquity public website must be accessible on all devices and web browsers. Text rendered as an image is not compatible with search engines, and should be used minimally to ensure the usefulness of the site.



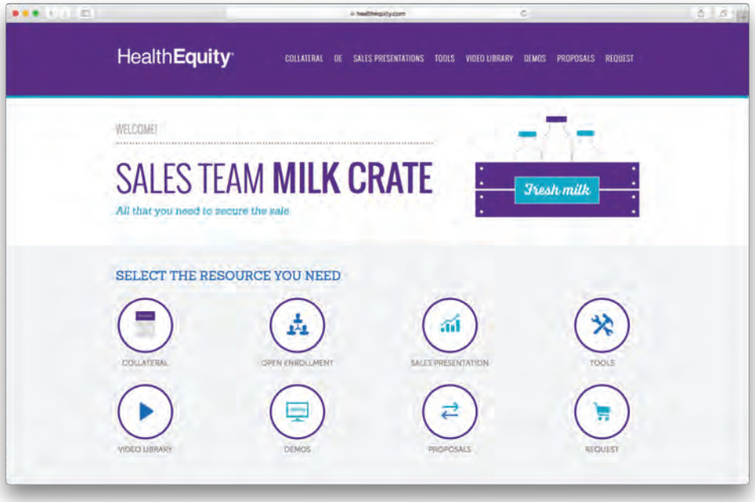
The Exchange

The Exchange is only available to HealthEquity employees. It has been built using SharePoint to provide widgets and other tools to help employees interact with commonly-accessed information. The Exchange does not have the same design constraints as the public website; however, it uses similar design elements, such as the brand colors, fonts and illustrations.



Marketing Milkcrate

The Milkcrate houses all of the latest and greatest Marketing resources. It can be accessed without VPN at www.HealthEquity.com/Milkcrate, but requires a username and password, found on the Marketing SharePoint page.



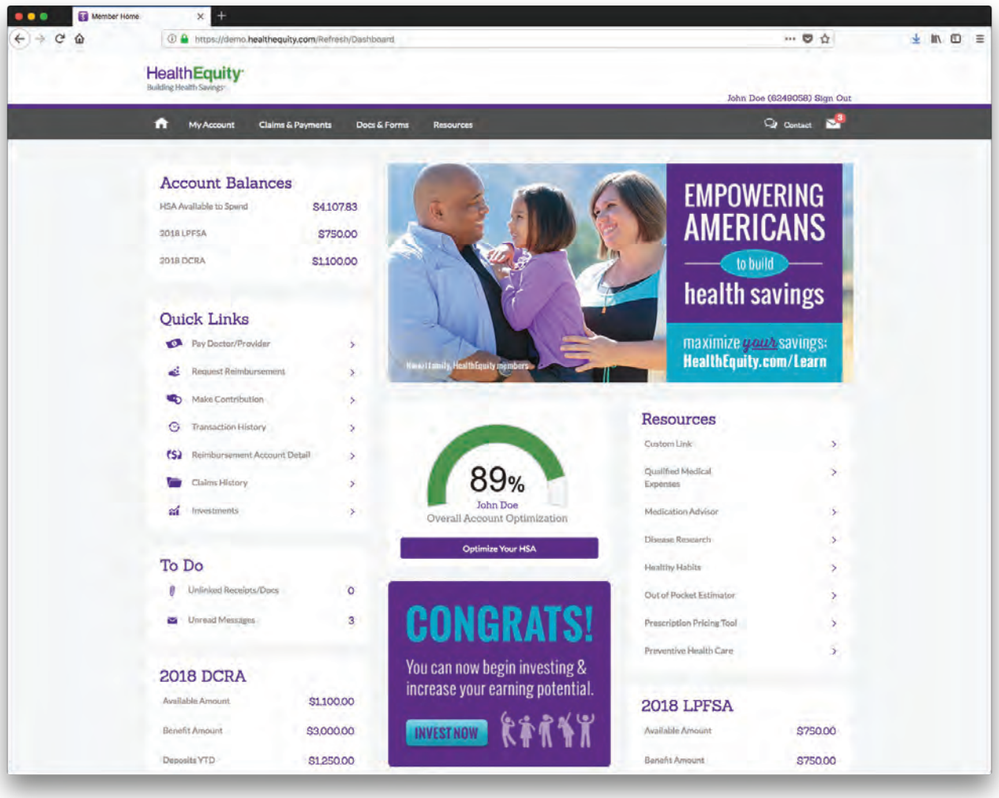
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ELECTRONIC MEDIA

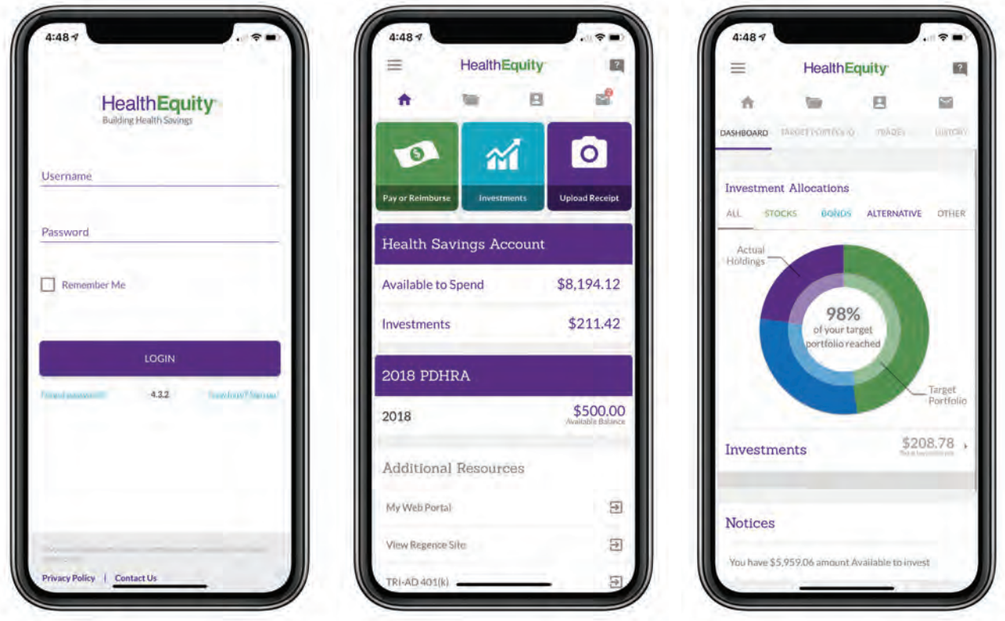
Member portal

The member portal is the website where members log in to manage their HealthEquity accounts. On this site members can make payments, track receipts and conduct other account-related activity. The Marketing team does not have access to and is not responsible for the member portal. If you have questions about the member portal, contact the Engineering team.



Mobile app

The HealthEquity mobile app provides our members with easy, on-the-go account access. It is available to download for free from the Apple® App Store® or Google Play®. Like the corporate website, the mobile app should present a consistent look and feel, including HealthEquity's brand elements. The Marketing team does not have access to and is not responsible for the mobile app. If you have questions about the mobile app, contact the Engineering team.



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SOCIAL MEDIA

Section 13

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SOCIAL MEDIA

Online social media platforms have changed the way individuals around the world work and communicate with each other. It is important that all employees are aware of the implications of engaging in forms of social media and online conversations that reference the company and/or the employee's relationship with the company. If employees choose to use social media for non-business related purposes, they must both understand and comply with the company's expectations regarding such use. Our primary social media outlets are: Facebook, LinkedIn and Twitter.

HealthEquity uses social media for three reasons:

1. To establish the company as an expert in the industry
2. To communicate with our members and partners
3. To promote our tools and services

Correct

Acting as HealthEquity...

- Only authorized individuals can make social media posts on behalf of the company.
- Content should be reviewed and approved by Marketing leaders before posting.
- Respect HIPPA, copyright, fair use, financial disclosure and other applicable laws, as well as company policies.
- The Marketing team responds to complaints on HealthEquity's social media channels. When responding to complaints, always remain friendly and empathetic and encourage taking the conversation to a less public forum.

Acting as a team member...

- Feel free to share, comment, like, retweet, hashtag, link to or otherwise distribute content created on our corporate pages and profiles.
- There are no restrictions on how you conduct yourself on your personal social media accounts, however, when referencing the company, always conduct yourself professionally.
- Send suggestions for content (pictures, articles, etc.) to marketingteam@healthequity.com.

Incorrect

Acting as HealthEquity or a team member you should not...

- Disclose the confidential or proprietary of HealthEquity or other third parties
- Use the company logo or other intellectual property without permission
- Publish articles or other content created by direct competitors
- Publish derogatory information about any individual or company (including competitors)

HealthEquity has a comprehensive social media and confidentiality corporate policy. Team members should adhere to this policy and reference it periodically. For more information you can access all corporate policies on the People Team's SharePoint page.



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SOCIAL MEDIA



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PUBLIC RELATIONS

Section 14

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PUBLIC RELATIONS

Managing the HealthEquity brand includes managing press inquiries and public relations regarding the company. Any media inquiries should be forwarded to the appropriate press and public relations contacts or the manager of the related department.

Media inquiries

Any media inquiries should be forwarded to pr@healthequity.com. If a team member cannot avoid fielding questions from the media (such as attending a live event and being asked to comment during an interview), they should follow the guidelines below.

Never discuss any of the following with the media:

A. Names of individuals

B. Client/partner names, job titles or contact numbers

C. Personal opinions

D. Future-looking statements

Press and PR contacts

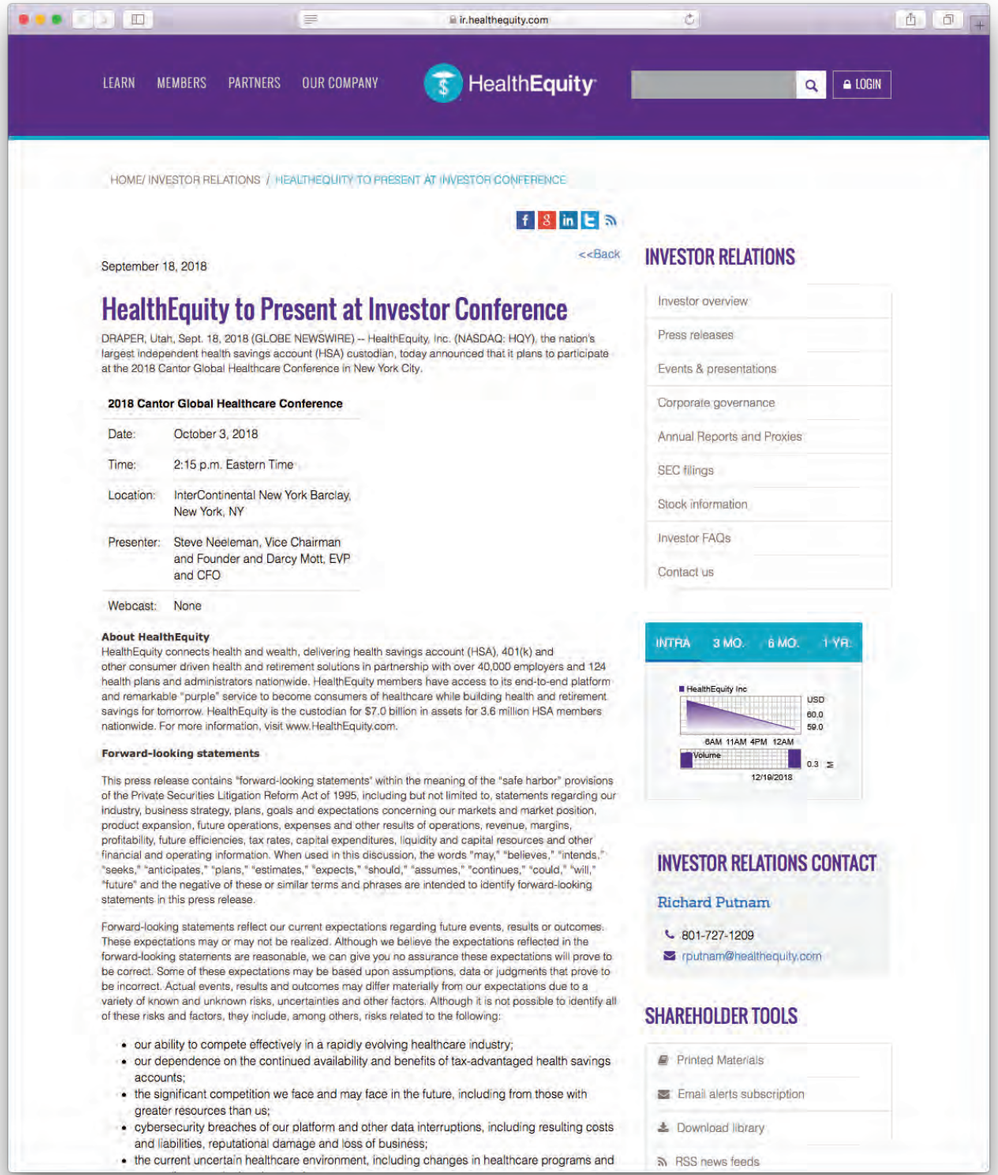
Any public relations questions or media inquiries should be directed to pr@healthequity.com.

Direct media contact:

Stephanie Muir
P: 801.455.1979
smuir@healthequity.com

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Press release example



ir.healthequity.com

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September 18, 2018

HealthEquity to Present at Investor Conference

DRAPER, Utah, Sept. 18, 2018 (GLOBE NEWSWIRE) -- HealthEquity, Inc. (NASDAQ: HQY), the nation's largest independent health savings account (HSA) custodian, today announced that it plans to participate at the 2018 Cantor Global Healthcare Conference in New York City.

2018 Cantor Global Healthcare Conference

Date:	October 3, 2018
Time:	2:15 p.m. Eastern Time
Location:	InterContinental New York Barclay, New York, NY
Presenter:	Steve Neeleman, Vice Chairman and Founder and Darcy Mott, EVP and CFO
Webcast:	None

About HealthEquity
HealthEquity connects health and wealth, delivering health savings account (HSA), 401(k) and other consumer driven health and retirement solutions in partnership with over 40,000 employers and 124 health plans and administrators nationwide. HealthEquity members have access to its end-to-end platform and remarkable "purple" service to become consumers of healthcare while building health and retirement savings for tomorrow. HealthEquity is the custodian for $7.0 billion in assets for 3.6 million HSA members nationwide. For more information, visit www.HealthEquity.com.

Forward-looking statements

This press release contains "forward-looking statements" within the meaning of the "safe harbor" provisions of the Private Securities Litigation Reform Act of 1995, including but not limited to, statements regarding our industry, business strategy, plans, goals and expectations concerning our markets and market position, product expansion, future operations, expenses and other results of operations, revenue, margins, profitability, future efficiencies, tax rates, capital expenditures, liquidity and capital resources and other financial and operating information. When used in this discussion, the words "may," "believes," "intends," "seeks," "anticipates," "plans," "estimates," "expects," "should," "assumes," "continues," "could," "will," "future" and the negative of these or similar terms and phrases are intended to identify forward-looking statements in this press release.

Forward-looking statements reflect our current expectations regarding future events, results or outcomes. These expectations may or may not be realized. Although we believe the expectations reflected in the forward-looking statements are reasonable, we can give you no assurance these expectations will prove to be correct. Some of these expectations may be based upon assumptions, data or judgments that prove to be incorrect. Actual events, results and outcomes may differ materially from our expectations due to a variety of known and unknown risks, uncertainties and other factors. Although it is not possible to identify all of these risks and factors, they include, among others, risks related to the following:

- our ability to compete effectively in a rapidly evolving healthcare industry;
- our dependence on the continued availability and benefits of tax-advantaged health savings accounts;
- the significant competition we face and may face in the future, including from those with greater resources than us;
- cybersecurity breaches of our platform and other data interruptions, including resulting costs and liabilities, reputational damage and loss of business;
- the current uncertain healthcare environment, including changes in healthcare programs and

INVESTOR RELATIONS

- Investor overview
- Press releases
- Events & presentations
- Corporate governance
- Annual Reports and Proxies
- SEC filings
- Stock information
- Investor FAQs
- Contact us

INTRA 3 MO. 6 MO. 1 YR.

HealthEquity Inc USD 60.0 59.0

6AM 11AM 4PM 12AM

Volume 0.3

12/19/2018

INVESTOR RELATIONS CONTACT

Richard Putnam

801-727-1209

rputnam@healthequity.com

SHAREHOLDER TOOLS

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- Download library
- RSS news feeds

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Draper, UT 84020

877.727.1000
801.727.1005 (Fax)
info@healthequity.com

Marketing team

marketingteam@healthequity.com

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HealthEquity_Brand_Book_Jan_2019