



SOAR AHEAD SEASON

#SOARAHEAD

Join us in delivering health & wealth oriented solutions, offers, access & rewards to increase sales



and lower acquisition costs while passing savings on to our participants to help everyone #SOARAHEAD.

KEYS TO PARTICIPATE

1. **Provide participants a deal greater than they can obtain on their own or from a similar program**
2. **Share revenue or sponsor promotions to off-set communication costs**
3. **Remain profitable to create a mutually beneficial long-term relationship**

CONNECT FOR YOUR BENEFIT™

The first step to promoting your business is to become a member yourself. Join today as a charter member to help us share and grow content so we can all #SOARAHEAD.



MISSION

Help participants start their year strong with new resolutions and new goals for the new year to #SOARAHEAD.

BENEFIT FOCUS

SOAR AHEAD is delivered through workplaces focused on the following during this period:

1. Budget to contribute to HSA's, FSA's and retirement accounts
2. Understand benefit plans
3. Identify goals and take action to acquire necessary education and access



PRINT DROP 12/20

Reserve your spot by 11/15 to be included in this season's SOAR AHEAD magazine and other groups' printed materials for this period.

JANUARY

Money Focus: **Tax Preparation**
Health Focus: **Exercise & Weight Loss**



Chinese New Year, diet, fitness equipment & memberships, financial planning, holiday clearance, MLK Day, New Year's Day, prepaid cards, resale, tax preparation, spring cleaning, weight-loss

FEBRUARY

Money Focus: **Financial Planning**
Health Focus: **Heart Health**



Boats & RVs, cellphones, computers, concerts, dental, Mardi Gras, Presidents Day Super Bowl, Valentine's Day,

Weddings

MARCH

Money Focus: **Credit Education**
Health Focus: **Nutrition**



Cesar Chavez Day, cruises, Easter, frozen food, March Madness, jewelry, lawn & gardening, perfume, St. Patrick's, ski & snowboard equipment, video games, vacations, vision care

SEASONAL FOCUS



PLANNING: Help people set and reach financial goals



EARNING: Maximize earnings from work and investments



SPENDING: Get people the best value for their hard earned money



SAVING: Increase savings and financial stability



SECURING: Secure personal information and accounts while properly insuring participants, their family, and their assets



SCORING: Optimize credit scores to reduce the cost of borrowing and help people get and keep jobs



NEED: Optimize access to high-quality, cost effective primary care and reduce the costs of specialty care



WELL-BEING: A-N-S-W-E-R-Oriented: Activity, Nutrition, Safety, Wisdom, Emotion, and Rest



STATUS: Better enable participants to track and view their personal health status including blood-pressure, cholesterol, activity, claims, and more



ENVIRONMENT: Match offerings to environments while customizing content, activities, incentives. and more