



## Why work with DataPath?

Over the past four decades, DataPath has possessed a single-minded focus on delivering innovative solutions and superior customer support. We're committed to empowering our clients to rise above their competition.

## Experience Matters

Founded in 1984, DataPath has been in this industry longer than any of our competitors. Our senior leadership team has over 100 years of combined industry experience and our team relies on the expertise of associates who have been with us for decades. Experience matters to us and it matters to our clients.

*"We've been with DataPath since 1988 and have never looked back."*

Linda Meyerhoffer, *President*  
Benefit Solutions

Over the past decade, the healthcare and benefits industry has weathered a storm through Congressional legislation and market demand. Our seasoned leadership team keeps a steady hand on the rudder, no matter which way the wind blows.

### Client-Focused, Market-Driven

DataPath is privately-owned company - we're focused on our clients, not beholden to shareholder or private equity interests. We work closely with our

clients, listening to their needs. In turn, we deliver flexible solutions that empower TPAs to simplify their benefits administration and rise above the challenges of a complicated healthcare market. Our cloud-based Summit platform is the industry's first solution for seamless CDH account, HSA, COBRA and billing administration.

### Industry-Leading Customer Support

We understand the value of relationships and how important it is to help our clients grow and support their businesses.

Software, without great customer support, is just software. Our knowledgeable and professional customer support team is highly responsive to client calls and emails. They work hard to listen to our clients' concerns and find a solution to their issues.

*"DataPath's competitive pricing, quality products and services, and focus on client relationships can't be beat."*

Susan Luskin, *President/CEO*  
Diversified Administration, Inc.

*“DataPath Partner Marketing is a wonderful resource. Their team is easy to partner with, and their work helps differentiate us.”*

Neil Bartholomew, *Founder*  
Eagle Ridge Services

## Partner Marketing

We deliver value to our clients, not only through our superior software and industry-leading customer support, but also by offering innovative ways for our clients to grow, manage, and maintain their businesses. DataPath Partner Marketing is like no other program in the industry.

Our clients have access to an award-winning employee education and engagement program, a library of enrollment season forms and materials, educational webinars, a marketing hotline, and more. Plus, we offer the industry’s only structured client rewards program.

## Conferences and Training

DataPath hosts our annual client conference at destination cities across the country. Locations include Chicago, Las Vegas, New Orleans, Orlando, Jackson Hole, Charleston, and more. In addition to providing the latest in company and product updates, each year we host industry leaders to provide insight on regulatory updates, anticipated market changes, and ways for our clients to grow their businesses. We also offer on-site and web-based training with experienced teachers who can help you maximize efficiency.

## Thought Leadership

DataPath publishes industry and market-focused whitepapers and blogs, hosts webinars, and is often cited in leading market publications.

# Timeline

A pioneer in our industry, we have achieved many thought leadership and innovation milestones, including:

- 1984** ● *DataPath founded to create solutions for tax-advantaged employee benefit plans*
- 1991** ● *Launched industry-leading system to administer FSAs*
- 1995** ● *MERPS and MSA systems released*
- 2003** ● *Launched our HRA and COBRA administration solutions*
- 2005** ● *Released our cloud-based HSA administration solution*
- 2007** ● *DataPath leadership helps found SIGIS*
- 2013** ● *Released Summit, our cloud-based administration platform*
- 2017** ● *Launched the industry’s first and only cloud-based platform for seamless CDH account and COBRA billing administration*
- 2018** ● *Employee education and engagement program received international and national awards*
- 2019** ● *Unveiled expanded billing functionality in Summit with retiree and direct billing*
- 2020** ● *Responded to the COVID-19 crisis with targeted solution updates for shifting administration needs*

