

TaxSaver Plan

Your Satisfaction Is Our Success

FSA • HRA • COBRA Administrative Services

a division of



Welcome & transition overview



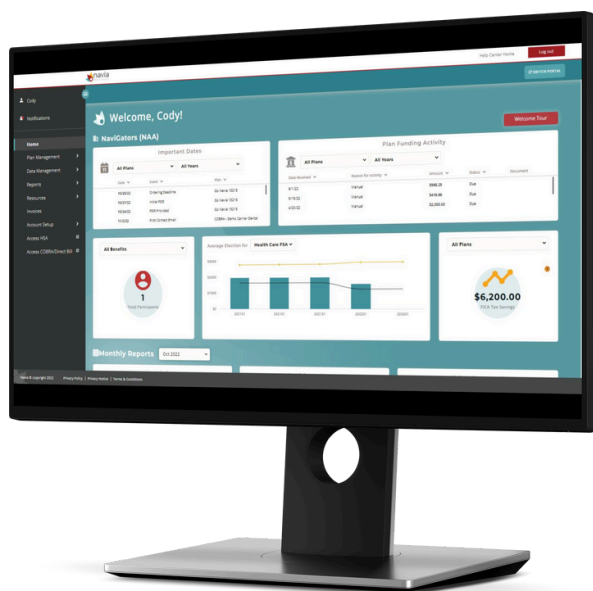
The TaxSaver/Navia partnership brings you a comprehensive benefits solution. You get the latest technology backed by the same great team.

Enhanced portal features coming in September 2025

- Robust security and service infrastructure, all fully compliant with HIPAA, PHI, and SOC II industry standards and requirements.
- Expanded capabilities and a better user experience for employers, brokers, and participants through the Navia web portals. Access, control, and download reports through simple and intuitive websites as well as real-time participant updates.
- Additional capability to ACH administrative fees.
- Additional plan types that can help you better attract and retain employees, including GoNavia commuter benefits, lifestyle spending accounts, retirement, Benefit Administration, and enhanced compliance services.
- Automated online renewal tool that allows you to renew, make changes, and add new plans quickly.
- Proprietary technology that is responsive to industry demands and changes.
- Extended customer service hours from 7 a.m. to 7 p.m. CT for benefit accounts.

Smart technology for an enjoyable benefit experience

We know well-designed technology can make administering your benefits easier and improve participant satisfaction. Navia's proprietary technology works across all solutions to make your day easier and improve everyone's benefit experience.



Navia technology highlights

- Employer portal
- Participant portal
- Broker portal
- MyNavia mobile app
- Online plan renewal
- Reporting & analytics
- Security (SOC 2 Type 1 certification)
- Robust service infrastructure with daily reporting





COBRA/Direct Bill Employer Portal Training Webinar

Sign up now!

Tuesday Sept. 2, 2025 10 am PST / 12 pm CST

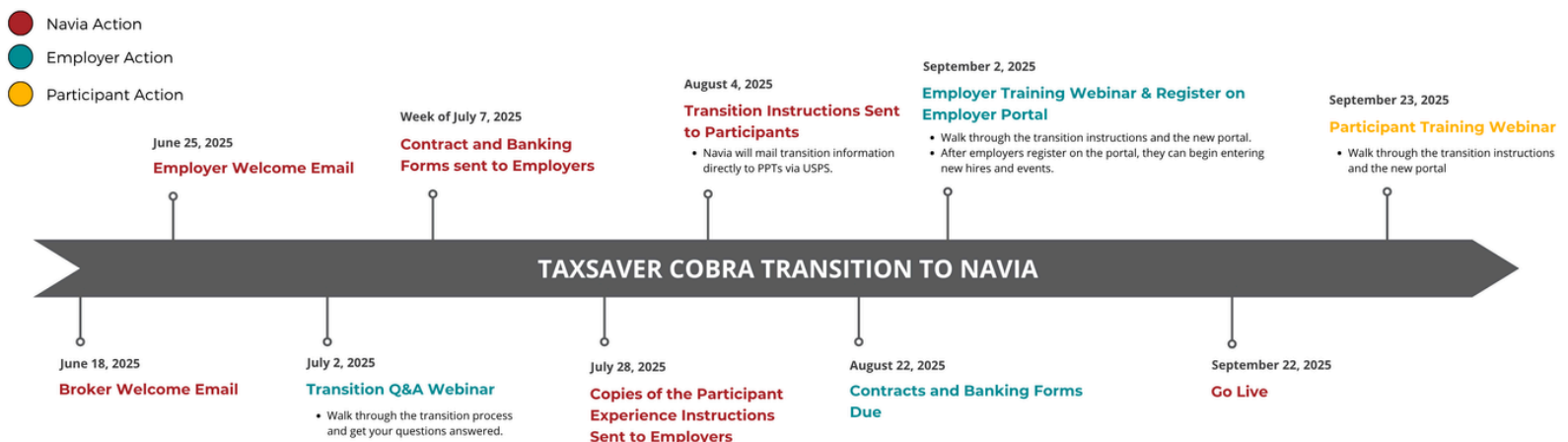
Navia will host a live webinar to provide you with the necessary information for active administration on the enhanced platform. You will learn how to use the Navia Employer Portal along with additional items for a successful transition and active administration.

What you need to do

Dedicated representatives from both TaxSaver and Navia will handle key activities associated with the migration of data to minimize any impact on you and your organization. Over the coming months, there are a handful of important actions to complete as part of the transition to the Navia platform. You will receive email communication throughout the process to remind you of next steps. Below is a checklist of key activities with a timeline:

- Sign and return your new Navia Administrative Services Agreement.
- Complete the Direct Debit and Credit Authorization Form. This form authorizes Navia to debit monthly administrative fees from your designated account and deposit monthly remittances into the same account.
- Attend the [Q&A Webinar on July 2, 2025](#).
- Starting September 2, 2025 enter COBRA/Direct Bill new hires and qualifying events into Navia's enhanced portal.
- Attend the [Employer Training Webinar on September 2, 2025](#).
- Register on [Navia's Employer Portal](#) on September 2, 2025. Online registration instructions will be provided via email.

Transition timeline



Click the timeline to download a copy!

More about Navia

An extension of your team

Navia is a full-service, consumer-directed benefits provider dedicated to building employer relationships that last for decades. We function as an extension of your team by providing industry-leading customer service, communications, and technology designed to make your job easier and your employees happy. Navia has grown over the years from a family-owned business into a family of nationwide experts, making us one of the premier benefits providers in the nation. We serve 9,000+ employers across all 50 states and offer solutions for any benefit strategy.



**navia
health**

Make paying for health care easier

- Health FSA
- HRA
- HSA
- Direct Billing
- MEC
- COBRA
- Ben Admin



**navia
life**

Improve quality of life at work and at home

- Day Care FSA
- GoNavia
- Lifestyle
- Adoption
- Tuition
- Student Loan
- Home Office
- Benefit Statements
- Retirement



**navia
compliance**

Stay compliant with the law and avoid costly fines

- ACA Reporting
- 5500s
- NDT
- ERISA
- POP
- 5500 Late Filing

Navia gathers its Net Promoter Score (NPS) year-round, receiving 13K+ responses a month from participants, employers, and brokers. **We consistently score 35 or above, which is 2X higher** than the industry average.

Questions?

We encourage you to bring your questions to our live [Q&A webinar on Wednesday, July 2, 2025 at 10am PST / 12 pm CST](#). In the meantime, feel free to email taxsavertransition@naviabenefits.com if you need to talk with someone before the webinar.