

HEALTH ROSETTA

CLIENT NOTICE

Congratulations! We're excited you've decided to work with a Health Rosetta Advisor. The Health Rosetta ecosystem ("HR") has a single mission to help group benefits purchasers sustainably reduce health benefits costs and provide better care for their employees. At core, we maintain the Health Rosetta, an expert-sourced blueprint for wisely purchasing benefits sourced from the highest-performing benefits purchasers and experts everywhere.

A primary goal of Health Rosetta Advisor Programs is to help benefits purchasers reduce spending *while* improving the quality of care your plan members receive. This notice is to help you understand what to expect working with a Health Rosetta Advisor.

What to expect from a Health Rosetta Advisor

One of our core principles is that higher transparency, trust, and integrity in the purchasing process improves the quality of benefits purchasing decisions. To facilitate this, Health Rosetta Advisors commit in our agreement with them to adhere to certain specific practices.

- Endeavor to only make changes to your health benefits programs that can potentially improve care while reducing your costs AND your employees' spending. No more choosing between hurting your organization or hurting your employees.
- Review this notice with you to set expectations.
- Fully and meaningfully disclose their compensation and other conflicts in writing.
- Think, plan, and act in your long term interests, including completing 3-5 year strategic plans.
- Adhere to the Health Rosetta Code of Conduct you should have received with this notice.
- Adhere to the Health Rosetta Plan Sponsor Bill of Rights you should have received with this notice.

These practices significantly differentiate both Health Rosetta Advisors and their design, purchasing, and management process from the typical highly-conflicted, opaque process. To help maintain the quality of

Health Rosetta Advisor Programs, they may also ask you to sign this notice and a couple other documents during the purchasing process.

How the Health Rosetta ecosystem and Advisor Program benefit you.

You'll likely benefit both directly and indirectly as a result of working with a Health Rosetta Advisor.

Here are a couple of the main ways:

- **Higher-value benefits**– If you implement Health Rosetta components, you should start seeing returns in the form of sustainably lower costs and higher quality care within the next 12 months. While we can't promise specifics as this varies on many factors, Health Rosetta components implemented by other employers have sustainably reduced their spending by 10-40% per year.
- **Access to a deep ecosystem of solutions and best practices**– Our healthcare system is in the early days of a dramatic transformation, with many new innovative approaches. This makes it difficult for you and most advisors to see through the noise. Health Rosetta Advisors have access to other Advisor Program members, industry leading experts, the Health Rosetta blueprint, and other community resources to help see through the noise, improving the likelihood that plan changes, programs, technologies, and services you implement are appropriate and likely to work.
- **Learning from others**- The education and other resources we make available for Health Rosetta Advisors are based on the real life experience of other purchasers, not theory. We actively cultivate shared learning to keep us abreast. We maintain a network of more than 3,500 experts and high national visibility to create a hivemind for identifying the best approaches. See just a few of our collaborators at healthrosetta.org/who-we-are/.

We have high expectations for Health Rosetta Advisors and work hard to attract those seeking to go above and beyond them. However, if you feel your Health Rosetta Advisor is not meeting your needs, discuss with them or contact us directly at employers@healthrosetta.org. We're happy to help. You can find more resources, our book *The CEO's Guide to Restoring the American Dream*, and subscribe to updates and education at healthrosetta.org.

From Dave, Sean, Melissa and the entire Health Rosetta team, we'd like to thank you for choosing to work with a Health Rosetta Advisor.

(Signature page follows)



The undersigned hereby agrees that a Health Rosetta Advisor has reviewed the contents of and documents referenced in the foregoing HEALTH ROSETTA CLIENT NOTICE with them.

Client: _____

Signed: _____

Date: _____

By: _____

Title: _____