

FY26

Corporate Social Responsibility Data Sheet

HealthEquity has reported information about our CSR programs, disclosures, and metrics with reference to voluntary frameworks and standards, including: the Global Reporting Initiative (GRI), the Sustainability Accounting Standards Board (SASB) - Software & IT Services Industry Standards, and the United Nations Sustainable Development Goals (SDGs). Relevant details and information can be found in the locations linked throughout the data sheet, including key policies and filings.

ABOUT HealthEquity

We are a leader and an innovator in providing technology-enabled services that empower consumers to make healthcare saving and spending decisions. We use our innovative technology to manage consumers' tax-advantaged Health Savings Accounts (HSAs) and other consumer-directed benefits (CDBs) offered by employers. As part of our services, we provide consumers with payment processing services, personalized benefit information, the ability to earn wellness incentives, and investment advice to grow their tax-advantaged healthcare savings.



Headquarters
Draper, UT



HSAs
~10.57 million



Total accounts
17.8 million



Network partners
200+

CSR Data Sheet

HealthEquity has reported the information cited with reference to the following voluntary reporting standards, frameworks, and initiatives: [The Global Reporting Initiative \(GRI\)](#); the [Sustainability Accounting Standards Board \(SASB\)](#) Software & IT Services industry standards; and the [United Nations Sustainable Development Goals \(SDGs\)](#).

Description		GRI	SASB	SDGs
Organization Details and Reporting Practices				
Organization Name	HealthEquity, Inc.	2-1		
Location of headquarters	Draper, UT	2-1		
Entities included in reporting	For a full list of subsidiaries of HealthEquity, Inc., see Exhibit 21.1 in 2026 HealthEquity 10-K	2-2		
Reporting period	Fiscal Year 2026 – February 1, 2025 to January 31, 2026	2-3		
Reporting frequency	Annual	2-3		
Contact point	Kaitlin Augustine, Senior Manager ESG, kaugustine@healthequity.com	2-3		
Restatements of information	N/A	2-4		
External assurance	HealthEquity did not seek external assurance for this data sheet	2-5		
Material topics	HealthEquity CSR website *	3-1, 3-2		
Activities, value chain and other business relationships	HealthEquity CSR website (Public Policy, Consumer Access, and Education section), 2026 HealthEquity 10K (pages 2-7)	2-6		
Employees				
Total team members	2,814 2026 HealthEquity 10K (page 11)	2-7		
Full-time team members	2,802	2-7		
Part-time team members	12	2-7		
Workers who are not employees	HealthEquity engages contractors but they are not included in total team member count	2-8		
Turnover	Total: 25%; Voluntary: 10%, 2026 HealthEquity 10K (page 10)	401-1		
Benefits provided to full-time employees that are not provided to temporary or part-time employees	See benefits eligibility by employment status in HealthEquity Benefits Guide	401-2		3, 8
Employee engagement	78% favorable, 15% neutral, and 7% unfavorable, based on a participation rate of 86%, 2026 HealthEquity 10K (page 10)		TC-SI-330a.2	
Career development	HealthEquity CSR website (Team Member Experience section), 2026 HealthEquity 10K (page 10)	404-2		8
Team member well being	HealthEquity CSR website (Team Member Experience section), HealthEquity Benefits Guide (Spring Health Mental Health Benefits) , HealthEquity Careers website , HealthEquity Benefits Education Site (Mental Health & Wellness, Employee Assistance Program)	403-3, 403-6		3, 8
Inclusion & Belonging	HealthEquity CSR website (Inclusion & Belonging section), HealthEquity Careers website			5, 8

Description		GRI	SASB	SDGs
Governance				
Governance structure and composition	2026 HealthEquity Proxy Statement (pages 3-4, 8-17), Corporate Governance Guidelines , HealthEquity CSR website (Corporate Governance & Ethics section)	2-9		
Nomination and selection of the highest governance body	2026 HealthEquity Proxy Statement (page 13)	2-10		
Chair of the highest governance body	2026 HealthEquity Proxy Statement (page 8)	2-11		
Role of the highest governance body in overseeing the management of impacts	2026 HealthEquity Proxy Statement (page 14-17, 21-22)	2-12		
Delegation of responsibility for managing impacts	2026 HealthEquity Proxy Statement (page 21-22)	2-13		
Role of the highest governance body in sustainability reporting	2026 HealthEquity Proxy Statement (page 16), Nominating, Governance and Corporate Sustainability Committee Charter	2-14		
Collective knowledge of the highest governance body	2026 HealthEquity Proxy Statement (page 4, 8-12)	2-17		
Evaluation of the performance of the highest governance body	2026 HealthEquity Proxy Statement (page 13)	2-18		
Board Demographics	Age Group - 2026 HealthEquity Proxy Statement (page 3)	405-1		
	Gender - 2026 HealthEquity Proxy Statement (page 3)	405-1	TC-SI-330a.3	5
Remuneration policies	2026 HealthEquity Proxy Statement (page 34-65), 2026 HealthEquity 10-K (page 10)	2-19		
Process to determine remuneration	2026 HealthEquity Proxy Statement (page 34-65), 2026 HealthEquity 10-K (page 10)	2-20		
Annual total compensation ratio	2026 HealthEquity Proxy Statement (page 60)	2-21		
Strategies, policies, and practices				
Statement on sustainable development strategy	HealthEquity CSR website	2-22		
Policy commitments	HealthEquity Code of Business Conduct and Ethics , HealthEquity CSR website (Corporate Governance and Ethics section) , HealthEquity Corporate Governance website	2-23		
Embedding policy commitments	HealthEquity Code of Business Conduct and Ethics , HealthEquity Corporate Governance Guidelines	2-24		
Processes to remediate negative impacts	HealthEquity Code of Business Conduct and Ethics (page 5-7), Whistle Blowing Policy	2-25		
Mechanisms for seeking advice and raising concerns	HealthEquity Code of Business Conduct and Ethics (page 6-7), Whistle Blowing Policy (page 3), 2026 HealthEquity Proxy Statement (page 24)	2-26		
Conflicts of interest	HealthEquity Code of Business Conduct and Ethics (page 2-3), HealthEquity CSR website (Corporate Governance and Ethics section)	2-15		

Anti-corruption policies, procedures, and training	HealthEquity Anti-Corruption Policy , HealthEquity CSR website (Corporate Governance and Ethics section)	205-2		
Communication of critical concerns	HealthEquity Code of Business Conduct and Ethics (page 6-7), Whistle Blowing Policy (page 3), 2026 HealthEquity Proxy Statement (page 24)	2-16		
		GRI	SASB	SDGs
Compliance with laws and regulations	HealthEquity does not disclose non-compliance unless deemed financially or otherwise material. For more information, see 2026 HealthEquity 10K and HealthEquity Code of Business Conduct and Ethics	2-27		
Membership associations	HealthEquity CSR website (Public Policy, Consumer Access, and Education section)	2-28		
Approach to stakeholder engagement	2026 HealthEquity Proxy Statement (page 24), HealthEquity Corporate Governance Guidelines , HealthEquity CSR website	2-29		
Collective bargaining agreements	HealthEquity does not have team members covered by a collective bargaining agreement	2-30		
Public Policy, Consumer Access, and Education section				
Public policy, consumer access, and education	HealthEquity CSR website (Public Policy, Consumer Access, and Education section, Member Education Center)			3
Cybersecurity and Data Privacy				
Data Privacy	2026 HealthEquity 10K (pages 26-28), HealthEquity Privacy website , General Privacy Notice , California Privacy Notice , Other State Privacy Notices , Employee Privacy , HealthEquity CSR website (Cybersecurity and Data Privacy section), HealthEquity Security & IT website	418-1	TC-SI-220a.1	16
Data Security	2026 HealthEquity 10K (pages 26-28), HealthEquity CSR website (Cybersecurity and Data Privacy section), HealthEquity Security & IT website	418-1	TC-SI-230a.1 TC-SI-230a.2	16
Community Outreach and Engagement				
Programs	HealthEquity CSR website (Community Outreach and Engagement section), HealthEquity Community Foundation website	413-1		1, 2, 8, 11
HealthEquity Community Foundation Grants Awarded	\$85,000	413-1, 203-1		1, 2, 8, 11

For more information, please contact:
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*The phrase 'material topics' and details on 'material topics' contained herein are referenced solely from a Corporate Social Responsibility ("CSR") perspective and are intended to identify priority CSR issues under that context. Material topics are not related to "materiality" as that term is used by the U.S. Securities and Exchange Commission ("SEC") or any other regulatory reporting bodies. Material topics are not, unless specifically referenced as such in HealthEquity's SEC and other regulatory filings, considered to be material by the SEC or any other regulatory standards of materiality



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