

Consumer expectations are in conflict with healthcare trends

CONSUMERS ARE MORE ACCESSIBLE & CONNECTED

80%+ of adults <50 years old **have smartphones** & are connected¹

1/3 of consumers have a health, fitness or **medical app**, 2x vs 2013²

LACK OF ACCESS IS DRIVING COSTLY CHOICES

Avg **wait time** for a first visit with a psychiatrist: 25 days³

65M people live in **primary care desert**⁴

71% of employer sponsored ER visits are **unnecessary**⁵

1. Pew Research Center, November 2016. 2. PwC, 2016. 3. HealthDay, October 2014. 4. MarketWatch, March 2016. 5. Truven Health Analytics, April 2013. © 2016 TELADOC, Inc. All rights reserved.

Telehealth checklist

A complete telehealth solution will:

- Improve access
- Drive utilization
- Ensure high clinical quality
- Scale to meet growing demand
- Provide 24/7 service
- Confirm ROI with independent validation

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What we do

24/7/365 ACCESS
Provide 24/7, on-demand access to board-certified providers via video, phone or mobile app

TREAT HEALTH ISSUES
Diagnose, treat and prescribe medications (if necessary) for common health issues

NEW PRODUCTS
Behavioral Health, Dermatology and Tobacco Cessation available

PROVEN ROI
Prevent unnecessary ER/UC visits to more cost-effective mode of care

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Telehealth tackles the big issues in healthcare

ISSUES:	TELADOC SOLUTION:
More patients (30M uninsured)	Over 575K visits in 2015
Fewer PCP's	24/7 access to providers
Longer wait times (avg. 19 days)	10 min median response time
Misuse of ER (no access to PCP)	92% patient resolution
Increasing costs	\$673 average savings/claim

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Effective resolution to a wide range of conditions

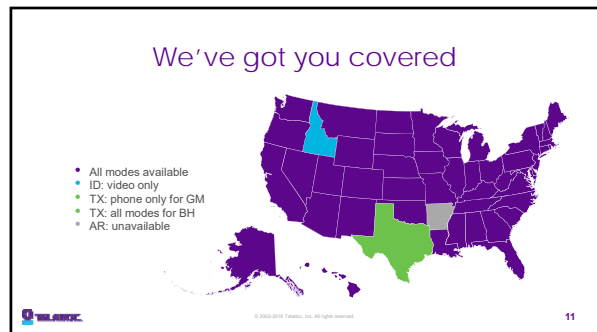
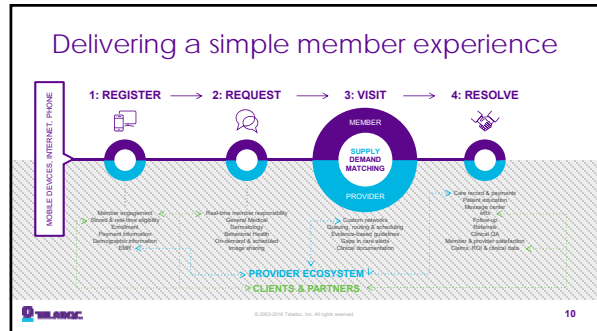
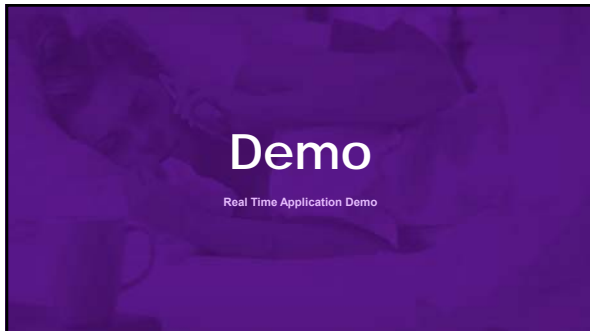
Select top diagnoses

- Sinus problems
- Nasal congestion
- Urinary tract infection
- Allergies
- Pink eye
- Flu
- Bronchitis
- Cough
- Upper respiratory infection
- Ear infection
- Rash
- General anxiety

Prescriptions as needed

- Best practices in prescription management
- No controlled substances, psychiatric or lifestyle drugs
- Member convenience through e-prescribing
- Appropriate prescribing following CDC guidelines
- 98% generic prescribing rate

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We equip you to drive change by transforming access to care

CLINICAL SPECIALTIES	MEMBER CHOICE	ROBUST INTEGRATIONS
<ul style="list-style-type: none"> General medical Pediatrics Mental health Substance abuse Dermatology Sexual health Tobacco cessation 	<ul style="list-style-type: none"> Request via mobile, web, and call center Visit via video, phone, and images On-demand & scheduled 	<ul style="list-style-type: none"> Health plans & benefit administrators Prescription routing Benefit vendors Transparency tools Worksite clinics EMR integration

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Delivering quality clinical care

- Directly recruit**
 - Match local supply with local demand & knowledge... at scale
 - Board certified and licensed
 - Specialties
- Delivery of care**
 - No time limits for visit
 - Not contractually obliged to refer patients to specific providers
 - Stringent, condition specific prescribing guidelines
- Credential & train**
 - NCOA-certified physician peer review credentialing program
 - 100+ proprietary, analytics and evidence based telehealth guidelines
- QA continuous monitoring**
 - 10% of medical charts reviewed
 - Provider level patient satisfaction tracked
 - Monitor medication frequency, continuously measured against industry benchmarks

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Teladoc member services campus

A CONSISTENTLY SUPERIOR EXPERIENCE

- Fully insured & dedicated solution
- 400+ employees on site
- 24/7 client and member issue resolution
- Multilingual services available

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CONTINUOUS MONITORING TO ENSURE QUALITY

Our QA team regularly reviews visit charts averaging approximately 2,500 charts a month.

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Expanding product portfolio delivers relevant value for members

Behavioral Health	Dermatology	Tobacco Cessation
<i>Industry's first comprehensive solution</i>	<i>Convenient, high quality access</i>	<i>Multi-faceted program to help members quit</i>
Longitudinal provider relationship	Secure image process	Physician directed protocols, including Rx
Psychopharmacology, Psychotherapy, Counseling	Tailored clinical protocols	Proactive coaching & reminders
Collaborative care	Dermatologist follow up included	Completion certificate available

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Exceptional patient satisfaction

95% Patient Satisfaction¹
82% industry standard²

90% Would Use It Again¹

92% Resolution Rate¹

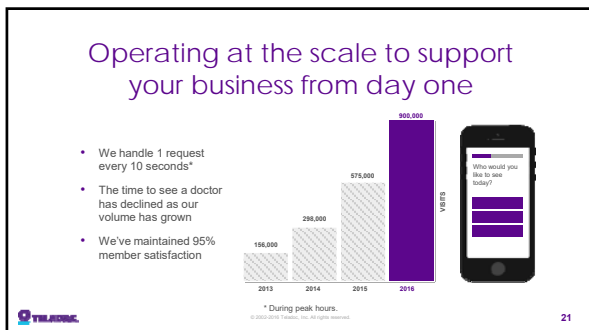
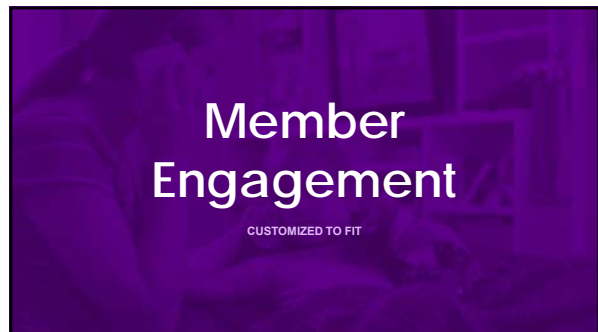
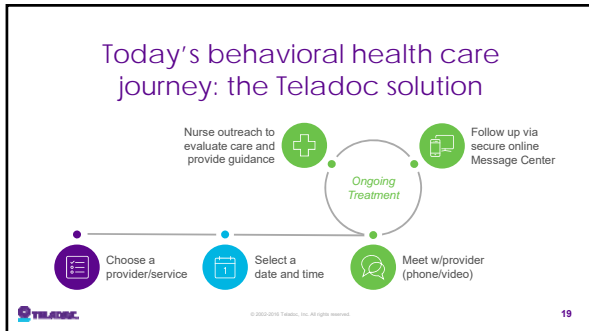
1. Teladoc Patient Satisfaction Survey 2015. 2. "2014 Chartbook: What Patients Say About Their Health Care Providers and Medical Practices," CAHPS.

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Behavioral health issues today

ACCESS CHALLENGES	EXPENSIVE CARE	INCONSISTENT CARE
Major provider shortages	Almost half of mental health professionals do not accept insurance	Only 41% of U.S. adults with a mental health condition received services in the past year
Mental health parity increases demand for care	45% of those untreated cite cost as a major barrier to care	48% of behavioral health patients only receive prescription drug treatment
Stigma of seeing a BH professional		

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Customization at member and client level



- CLIENT CUSTOMIZATION**
 - Logos
 - Plan specific member pricing
 - Custom landing pages
 - And more!
- MEMBER PERSONALIZATION**
 - Robust proprietary library of imagery (multicultural, industry specific, lifestage)
 - Target preferred modality
 - Spanish and bilingual materials

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Only Teladoc delivers these episode-of-care savings

\$191 Teladoc savings vs. office visit	\$2,661 Teladoc savings vs. ER visit	\$673 Teladoc savings vs. weighted average (office visit & ER)
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Episode of care includes initial encounter and any subsequent utilization of follow up office visits, hospitalization, or ER utilization, resulting from initial encounter within a 30 day window for same and related diagnoses. Weighted Average is based on redirection rates determined using member utilization of bricks and mortar services: 75% CV, 25% ER, 5% Do Nothing. © 2015-2016 Teladoc, Inc. All rights reserved. 28


Dedicated client service drives satisfaction and results



- Designated account management**
Average 18 years of healthcare experience
- Detailed monthly reporting**
ROI, Detailed Savings
Automated, in-depth utilization
Top conditions & Rx's
Member satisfaction
- Core vendor integrations**
Eligibility, claims processing, health plans

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An independent study revealed

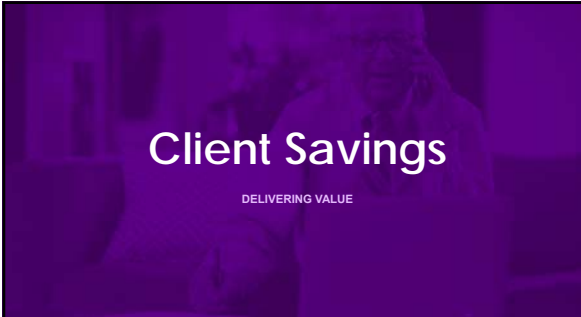


- 34% visits occurred on weekends & holidays
- 21% patients did not seek care in the past year
- 6% required a follow-up visit
- 52% represent top 3 diagnoses

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Client Savings

DELIVERING VALUE



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