

OptimizeRx

**ENVIRONMENTAL, SOCIAL, AND  
GOVERNANCE (ESG) REPORT**

April 2025



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## OptimizeRx Mission & ESG Business Practices

OptimizeRx Corporation (“OptimizeRx”, or the “Company”) is pleased to present the 2025 update to our Environmental, Social, and Governance (ESG) Report. At OptimizeRx, we believe in the power of connection to drive meaningful health outcomes. Our optimism is rooted in the understanding that when we use coordinated communication to bridge the gap between healthcare stakeholders, we create a more humanized and effective healthcare system. Even as regulatory requirements around ESG reporting are relaxing, we resolve to make regular disclosures of non-financial topics that matter to our stakeholders. ESG today originates in the decades-old Corporate Social Responsibility (CSR) movement with a goal for corporations to report on both shareholder value and stakeholder value. The early CSR movement was therefore explicitly a reaction to the fact that these sorts of disclosures were not legally required but were nevertheless socially desirable.

In that spirit, we will continue to strive to align our goals as a company with our responsibilities as conscientious corporate citizens. We remain vigilant in our quest to turn healthcare challenges into opportunities. Not only do these opportunities present us with new ways to grow and learn, but also to do better for our customers, employees, and the patients we impact, because increasing stakeholder value also drives shareholder value.

Our commitment to our stakeholders and community remains guided by our mission:

**“ To create a more informed and empowered healthcare community by ensuring that every interaction between healthcare stakeholders contributes to better, faster, and more positive health outcomes. ”**



## OptimizeRx Mission & ESG Business Practices [CONTINUED]

We believe that patients and healthcare providers deserve easy access to accurate, actionable information about medications and therapies. The 2024 integration of the consumer-focused solutions of Healthy Offers, Inc. (dba Medicx Health), strengthens our ability to deliver on our mission across expanded stakeholder groups with our increased data and analytics capabilities.

This ESG Report underscores our commitment to the principles of stakeholder capitalism and addressing universal priorities. We are proud to report the significant work we have done thus far to integrate ESG metrics into our governance and business strategy, and how we will continue to integrate these into every aspect of our work.

We continue to use efficient technology to keep our electricity usage down and operate almost completely paper-free.

We also impact our community through philanthropic efforts, including individual contributions from our employees and board members. In 2024 we donated a total of \$21,100 to help those affected by mental health issues, health issues, and social inequities, including donations to the American Foundation for Suicide Prevention, Feeding America, Light the Night, Zero Prostate Cancer, the American Heart

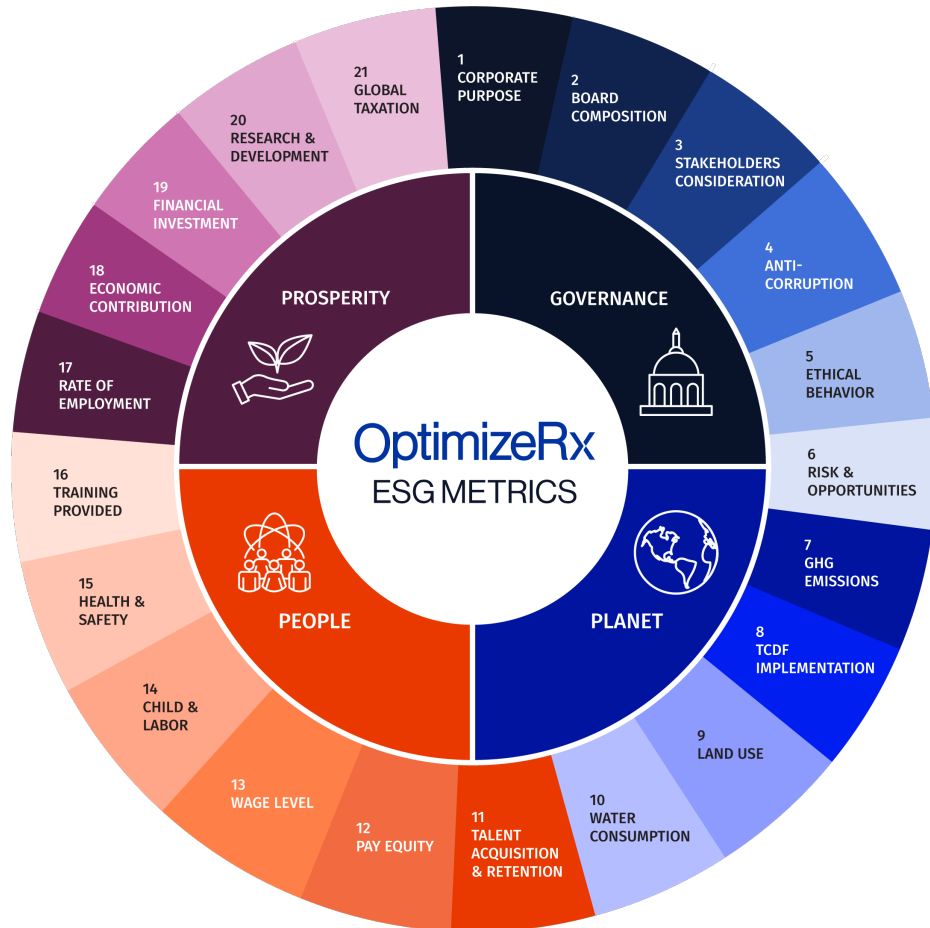
Association, and the Zagreb Red Cross Food Bank.

We have a strong commitment to continuing to support organizations in the communities in which we live and where we operate.



# OptimizeRx Mission & ESG Business Practices [CONTINUED]

Integrating ESG values into all aspects of our business is a journey. We will continuously evolve to meet the changing needs and circumstances of our world, and report transparently on those efforts. With this ESG Report, we continue to build on our ESG metrics to align with the 21 core ESG metrics of the World Economic Forum across four categories: Governance, Planet, People and Prosperity.



Thank you for taking the time to read our ESG Report. We strive to foster an inclusive organization with a strong governing structure that supports long-term sustainability and social responsibility. We will continue to build on our ESG momentum as we refine and measure our impact.

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## Governance Body Composition

The Board of Directors of OptimizeRx Corporation (the “Board”) sets high standards for our Company’s employees, officers and directors, including sound corporate governance. It is the Board’s duty to serve our stakeholders and to oversee the management of our business.

To exercise this duty, the Board implements its governance documents and guidelines, including the Corporate Governance Guidelines adopted by the Board in 2021. The Board recognizes that best practices for corporate boards of directors and practical considerations change over time and, as such, the Board continuously monitors developments in these areas and will amend the Guidelines as it deems appropriate in the best interests of our Company and our stakeholders, or as required by applicable laws and regulations.

An overview of our corporate governance standards and documents can be found on our website: <https://investors.optimizerx.com/esg/>.

The Board’s Nominating & Governance Committee oversees corporate governance policies and reviews our ESG strategies and practices. This includes vetting candidates for election to the Board, reflecting the Company’s commitment to create a values-based, inclusive workplace in alignment with long-term ESG goals.

OptimizeRx’s Board is committed to, and the Nominating & Governance Committee has prioritized, building a Board of Directors with a wide range of perspectives based on the director’s or director candidate’s background, experiences (including experience with businesses and other organizations of a comparable complexity), perspectives, skills, thought, and specialized professional experience.

At least annually and when Board vacancies arise, the Nominating & Governance Committee and the Board will review the qualifications, judgment, attributes, background, experiences, perspectives and skills of each director and any director candidate and the interplay of these traits with those of the Board as a whole.

Visit our [website](https://www.optimizerx.com/about-oprx/leadership) to learn more about our Leadership Team and Board of Directors and the qualifications, experience, and composition of its members: <https://www.optimizerx.com/about-oprx/leadership>.

## Governance Body Composition [CONTINUED]

BOARD SKILLS AND EXPERIENCE MATRIX							
	Gus D. Halas <sup>1</sup>	Lynn O'Connor Vos (Chair)	James Lang	Patrick Spangler	Greg Wasson	Cathy Klema	William J. Febbo <sup>2</sup>
<b>Skills and Experience</b>							
Current/Former Public Company CEO	✓	✓			✓		✓
Strategic Planning	✓	✓	✓	✓	✓	✓	✓
Mergers & Acquisition/Joint Ventures	✓	✓	✓	✓	✓	✓	✓
Business Operations	✓	✓	✓	✓	✓	✓	✓
Risk Management	✓	✓	✓	✓	✓	✓	✓
Other Public Company Board Experience	✓	✓	✓	✓	✓	✓	✓
Digital Healthcare Technology	✓	✓	✓	✓	✓	✓	✓
Healthcare Industry	✓	✓	✓	✓	✓	✓	✓
Technology/Information Security/Cybersecurity	✓		✓	✓			✓
Corporate Governance	✓	✓	✓	✓	✓	✓	✓
Sales and Marketing	✓	✓	✓				✓
High Level of Financial Accounting or Financial Expertise	✓	✓	✓	✓		✓	✓
Executive Compensation	✓	✓	✓	✓	✓	✓	✓
Government & Regulatory	✓		✓	✓			
Environmental/Sustainability/Climate Change		✓	✓				✓
Human Capital Management	✓	✓	✓	✓	✓	✓	✓
<b>Tenure and Independence</b>							
Years	10	9 <sup>3</sup>	7	6	4	2	8
Independence	✓	✓	✓	✓	✓	✓	

<sup>1</sup> Gus Halas left the Board of Directors in June 2024.

<sup>2</sup> William J. Febbo's tenure at the Company ended on December 31, 2024. This reduced the number of board members to six, effective January 1, 2025.

<sup>3</sup> Lynn Vos joined the OptimizeRx Board of Directors in 2015 as a representative director of Grey Healthcare Group and joined as an independent director in 2017.

## Material Issues Impacting Stakeholders

Since our inaugural 2022 ESG Report, we have made significant progress by developing a materiality matrix to identify the critical issues affecting our business and stakeholders. This year's surveyed stakeholders included representatives from institutional investors, shareholders, the Board of Directors, employees, and key business partners. Now with three years of survey data on a broad variety of ESG topics, we have narrowed our focus on those issues that our stakeholders have consistently prioritized.

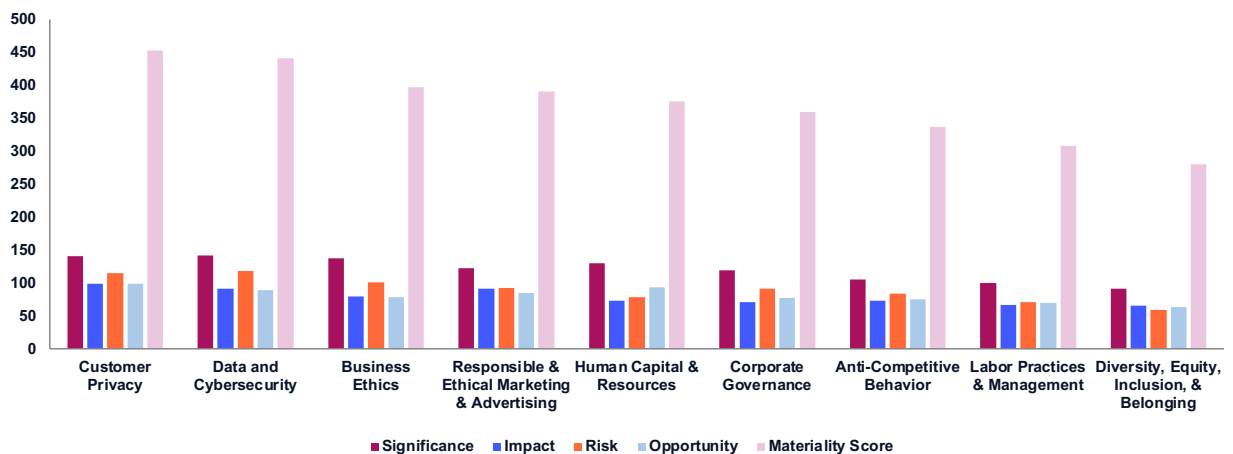
In the survey, stakeholders were asked whether each topic was significant to OptimizeRx, and if so, to evaluate the impact on society, as well as the degree of risk or opportunity that topic posed to OptimizeRx's bottom line. The sum of these ratings yields the "Materiality Score" for a given topic.

This year we have omitted topics from the survey which stakeholders have consistently rated as immaterial to our business, including Employee Health and Safety, Competitive Behavior, Sustainable Innovation & Investment, Human Rights, Community Service & Engagement, Energy Management and Renewable Energy, Supply Chain Management, Climate Change & Adaptation, Electronic Waste, Natural Resources Management, Water and Wastewater Management, and Tax and Economic Contribution. This furthers our long-term materiality strategy, which requires that we focus on the important topics that we can influence and improve.

The current survey results showed continued trends from prior years. Our stakeholders consistently prioritize topics around Data and Advertising, which include Customer Privacy, Data and Cybersecurity, and Responsible and Ethical Marketing & Advertising.

Stakeholders still view Business Ethics and Human Capital as key topics, but rated some topics slightly lower, including Corporate Governance, Anti-Competitive Behavior, Labor Practices and Management, and Diversity, Equity, Inclusion, and Belonging.

### Materiality Survey Results



### Explanation of Materiality Rating Categories

- **Significance:** Is this topic material to OptimizeRx at all?
- **Impact:** What is OptimizeRx's impact on the world at large for this topic?
- **Risk:** How financially negative could this topic potentially be for OptimizeRx?
- **Opportunity:** How financially positive could this topic potentially be for OptimizeRx?

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## Anti-Corruption Practices

We are committed to conducting our business ethically and in compliance with all applicable laws and regulations governing our operations. We do not tolerate bribery or corruption and are committed to acting professionally, fairly, and with integrity in all of our business activities and relationships in keeping with the highest moral, legal and ethical standards.

OptimizeRx currently has several policies in place requiring ethical and compliant practices, including:

- [Code of Business Conduct and Ethics](#)
- [Corporate Governance Guidelines](#)
- [Stock Ownership Guidelines](#)
- [Global Anti-Bribery and Anti-Corruption Policy](#)
- [Insider Trading Policy](#)
- [Clawback Policy](#)
- [Board Confidentiality Policy](#)
- [Related Person Transaction Policy](#)
- [Regulation FD Policy](#)
- [Human Rights Policy](#)

These policies and others may also be found on our [website](#).

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## Mechanisms to Protect Ethical Behavior

OptimizeRx expects and requires ethical behavior from its directors, leadership, and employees. Through the Company's **Code of Business Conduct and Ethics**, we promote honest and ethical conduct, including handling actual or apparent conflicts of interest in an ethical manner and acting with honesty and integrity.

All employees and members of the Board are required to complete training on the Code of Business Conduct and Ethics and Insider Trading Policy, and they must acknowledge these policies as a condition of employment and Board membership. We have implemented a formal learning management system in which anti-corruption, anti-bribery, insider training, and other relevant training to ethical business conduct are annually conducted and tracked.

Our Code of Business Conduct and Ethics, however, is not intended to be a comprehensive rulebook and cannot address every situation. If an employee or director is uncomfortable about a situation or has any doubts about whether a situation or behavior is consistent with ethical standards, they are encouraged to seek advice from their immediate supervisor or department manager, Human Resources, or the Chief Legal Officer.

In addition to seeking guidance, employees and directors are expected to report any known or suspected unethical behavior, violations of our Code of Business Conduct and Ethics, Company policies or applicable law. In accordance with our **Whistleblower Policy**, we provide several channels for speaking up without fear of retaliation, including:

- Reporting a known or suspected violation to an immediate supervisor or department manager, Human Resources, or the Chief Legal Officer.
- Anonymously reporting a known or suspected violation by going to a dedicated external whistleblower website or phone hotline.

We believe we have created an environment where any employee or corporate stakeholder should feel comfortable reporting perceived unethical or unlawful behavior. We acknowledge that it is not always easy to step forward with information, but doing so ensures that our Company continues to have a safe and respectful work environment, and we have provided several avenues for individuals to do so. Thus, we prohibit any retaliation against anyone who, in good faith, seeks help or reports known or suspected violations. We take all allegations of retaliation seriously and will promptly and thoroughly investigate these matters. If the Company becomes aware of any retaliation, it will take appropriate disciplinary action.

Our Code of Business Conduct and Ethics, Whistleblower Policy and other policies are available on our [website](#).

## Risk Oversight & Opportunities

### Risk Oversight & Opportunities

OptimizeRx recognizes the imperative for our Company to anticipate and respond to emerging financial and non-financial risks, specifically those related to economic, environmental and social issues. Ultimately, risks arising from ESG issues not only have the potential to negatively impact business financial objectives but may also result in missed opportunities for creating new solutions or cost-savings initiatives, and could harm our key stakeholders, communities, and planet.

As stewards of long-term corporate performance, the Board of Directors has a critical role in ensuring that our Company is aware of, and able to navigate, an ever-evolving risk landscape. The OptimizeRx Board of Directors is ensuring the active identification, management, and ongoing monitoring of these risks and opportunities. In the coming years, OptimizeRx will prioritize those ESG risks and opportunities identified in its past materiality surveys to create sustained stakeholder value.

### Cybersecurity

As seen from the materiality assessment survey feedback from our stakeholders, among risks that take highest priority at OptimizeRx are those associated with stewardship of personal data and cybersecurity, including the ethical use and governance of artificial intelligence (AI) related to such data. The global data protection landscape is rapidly evolving, and as a company in the life sciences and healthcare industry, we are subject to numerous laws, requirements and regulations governing the collection, use, disclosure, retention, and security of personal information, including sensitive health-related information.

OptimizeRx has not experienced a cybersecurity incident to date; however, cybersecurity incidents pose material risks that could disrupt business operations, result in the loss of critical and confidential information, and adversely impact our reputation and results of operations. We employ comprehensive measures to prevent, detect, address and mitigate these threats, including access controls, insurance, vulnerability assessments, continuous

monitoring of our IT networks and systems, maintenance of backup and protective systems and user training and education.

Our information security and risk management program is designed to identify, assess, and manage material risks from cybersecurity threats to our applications, computer networks, third-party hosted services, communications systems, hardware and software, and our critical data, including intellectual property, confidential information that is proprietary, strategic or competitive in nature, personal information, or Personal

Health Information (“PHI”) (collectively, “Information Systems”).



## Risk Oversight & Opportunities [CONTINUED]

We identify risks based on various assessments and real-world feedback such as penetration tests and document these in a central Risk Register for mitigation and other treatment decisions.

This year, we consolidated disparate policies and procedures into a comprehensive Information Security Policy. We also completed our first SOC 2 Type 1 and Type 2 assessments, replacing our former HITRUST certification. OptimizeRx's SOC2 certification covers the trust services criteria of Privacy, Security, Accessibility, and Confidentiality.

### Regulatory

Recent changes in the United States federal regulatory space for healthcare and medical research may cause the industry to reduce expenditures overall. This may result in fewer new drugs coming to market, or less spending on marketing for new drugs.

Federal and state governments have been increasingly placing greater restrictions on the marketing and advertising practices of healthcare companies, particularly pharmaceutical companies. This comes in addition to a growing patchwork of state registration of data protection laws, some of which specifically target the use of health-related data.

Technologies underlying AI (used in our DAAP solution) and its uses are subject to a variety of laws and regulations and AI continues to be the subject of ongoing review by various federal, state, and international governments and regulatory agencies, and various of these bodies are applying, or are considering applying, existing laws and regulations to AI or are considering general legal frameworks for AI. We may not be able to anticipate how to respond to these rapidly evolving frameworks, and we may need to expend resources to adjust our operations or offerings in certain jurisdictions if the legal frameworks are inconsistent across jurisdictions.

For more detailed information on our risk factors, and especially for financial risk factors, please see our Annual Report on Form 10-K, our subsequent Quarterly Reports on Form 10-Q, and our other filings with the Securities and Exchange Commission.



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# Environment

The materiality of our ESG disclosure topics is informed by the potential sustainability impacts, risks, and opportunities relevant to our industry and refined by our materiality assessment (see Material Issues Impacting Stakeholders). As a digital messaging technology company, the Sustainable Industry Classification System (SICS) places us in the Internet Media & Services industry.

For companies in the Internet Media & Services industry, Energy Management is generally defined as a material disclosure topic according to the SASB Standards.

By contrast, SASB has not identified other environmental sustainability issues such as GHG Emissions, Air Quality, Water & Wastewater Management, Waste & Hazardous Materials Management, and Ecological Impacts as most likely to impact enterprise value for companies in the Internet Media & Services industry.

We recognize that the SASB Standard is designed for the typical company within a specific industry, with individual companies choosing to report on different sustainability issues based on their unique business model. We have decided to identify GHG Emissions as a disclosure topic on the basis of our stakeholder materiality assessment and pending regulation. However, we have not identified Air Quality, Water & Wastewater Management, Waste & Hazardous Materials Management, and Ecological Impacts as material disclosure topics for this reporting period.

For more detailed information on our risk factors, and especially for financial risk factors, please see our Annual Report on Form 10-K, our subsequent Quarterly Reports on Form 10-Q, and our other filings with the Securities and Exchange Commission.

## **Environmental Policy**

OptimizeRx's environmental policy is available at <https://investors.optimizerx.com/esg/>.

## **Environmental Management System**

With very limited environmental impacts, an Environmental Management System falls outside the scope of our sustainability focus. We will review the appropriateness of an Environmental Management System annually, and especially in light of any changes to the relative size and focus of our operations.

## **Greenhouse Gas (GHG) Emissions**

Since 2023, we have reported on Scope 1 and 2 emissions resulting from our U.S. operations according to the Greenhouse Gas Protocol (standards set by the World Business Council for Sustainable Development and World Resources Institute).

In 2024, we built on this foundation and measured Scope 1 and 2 emissions across all of OptimizeRx's office locations in the United States as well as in Croatia.

## Environment [CONTINUED]

### Scope 1 and 2 Emissions

LOCATION	NOx (lbs)	CH4 (lbs)	SO2 (lbs)	N2O (lbs)	CO2e (lbs)	CO2e (Metric tons)
Michigan	37.97	238.49	34.98	1,777.82	31,015.54	14.06
Massachusetts	49.14	226.22	123.93	1,781.50	7,185.24	3.26
Arizona	131.14	1,212.28	460.22	8,283.91	34,683.48	15.72
Croatia	-	-	-	-	11,792.87	5.35
<b>TOTALS</b>	<b>218.26</b>	<b>1,676.99</b>	<b>619.13</b>	<b>11,843.2</b>	<b>84,677.14</b>	<b>38.39</b>

See Appendix 3 for our Emissions Calculations Methodology.

### Air Quality

While nitrous oxide (NOx) and sulfur oxides (SOx) are potent greenhouse gases, they are predominantly generated by industrial activities, such as the combustion of fossil fuels and solid waste as well as the treatment of wastewater.

As a digital messaging technology company, OptimizeRx's operations do not have a significant impact on air quality, air emissions, or air pollution. Therefore, air quality issues are not considered to be material disclosure topics for OptimizeRx.

Where data are available, NOx and SOx are included as emissions factors in OptimizeRx's greenhouse gas emissions inventory.

### Savings from Using an Electronic Contract Lifecycle Management System

**4,077 lb of carbon emissions reduced**



**5,114 gal of water conserved**



**1,737 lb of wood saved**



**282 lb of waste eliminated**



■ 2022 ■ 2023 ■ 2024

## Environment [CONTINUED]

### Electronic Waste

OptimizeRx recognizes that the Basel Convention on the Control of Transboundary Movements of Hazardous Wastes and Their Disposal aims to minimize the generation of hazardous wastes, including Waste Electrical and Electronic Equipment (“WEEE” or “e-waste”), and ensure their environmentally sound management. We observe that the United States is not a party to the convention, however it serves as a global framework that promotes responsible e-waste management. The EPA supports the Government’s National Strategy for Electronics Stewardship under which the Sustainable Management of Electronics is being implemented. Under this approach, two certified e-waste recycling schemes are generally available to U.S. businesses: Responsible Recycling (R2) and the e-Stewards Standard.

Our primary source of e-waste is our company-issued laptops. In the U.S., we use a vendor who disposes of them in accordance with the R2 standard. In Croatia, when laptops are retired, we reset, wipe, and resell them.

### Nature Loss

The majority of our employees work remotely and are geographically distributed across the United States and Croatia. OptimizeRx leases office space exclusively (in Clarkston Michigan, Waltham Massachusetts, Scottsdale Arizona, and Zagreb, Croatia). As such, our Company does not currently measure impact on land use and key biodiversity areas.

In 2025, we aim to collect data from our Company to report Scope 3 emissions. We take pride in commencing this effort not only to demonstrate our dedication to the environment but also to establish the capacity to be well-prepared as reporting requirements continue to evolve.



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## Talent Acquisition and Retention

We are dedicated to maintaining an environment where everyone feels valued, and we celebrate both the differences and similarities among our people. We also believe that contributions stemming from each employee's cultural, economic and social background, experience, and thought are essential in making our Company stronger. Collaboration drawn from a range of perspectives enhances decision-making, sparks innovation, and drives better business outcomes. An inclusive culture boosts employee engagement, attracts top talent, and reduces turnover which furthers long-term success.

Impartiality in employment practices is an essential part of our business and is necessary to contribute to a culture of respect. We have a collective responsibility to foster a culture of fairness, respect, inclusion, and belonging that drives us to value and embrace differences. We provide merit-based opportunities to all individuals without regard to age, race, color, national origin, ancestry, citizenship, religion, gender, sexual orientation or gender identity.

In 2021 we introduced a committee dedicated to these principles to ensure our employees feel valued, seen and celebrated. This committee is actively engaged in improving our culture, hiring practices and education.

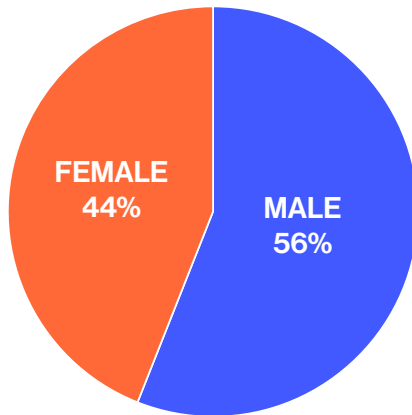
Our other recent initiatives include:

- Implementing a Competency Model to clearly define competency levels and expectations for skills, knowledge and experience, and to provide department-specific career progression visuals, to guide each employee's growth and success.
- Introducing the SPARK employee recognition program to recognize and celebrate Sustained Excellence, Positive Impact, Accountability, Resilience and Kindness.
- Launching affinity groups (employee resource groups) to encourage employees with similar interests to organically start and participate in groups that are of interest to them. In 2024, OptimizeRx had affinity groups for parents and caregivers, a book, television and movies club, a health and wellness group, and a group for LGBTQIA+ persons & allies.
- Adding email and correspondence signature taglines highlighting topics that are important to our Company and stakeholders, which change periodically based on consensus from the committee.
- Expanding the committee to new members within the Company and establishing a subcommittee for special events.
- Hosting quarterly educational and celebratory events that highlight important dates and socially and culturally significant milestones, or that emphasize relevant topics, such as fostering good mental health.

## Talent Acquisition and Retention [CONTINUED]

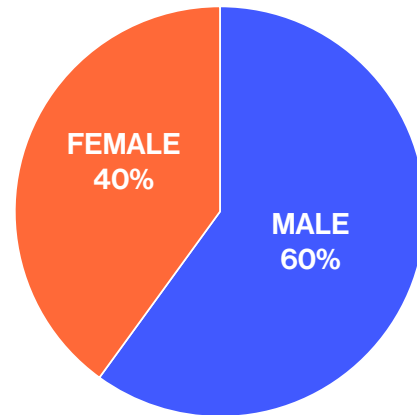
### US EMPLOYEES GENDER, AGE AND RACE BREAKDOWN:

Males: 56% Females: 44%



### EXECUTIVE MANAGEMENT TEAM GENDER, AGE AND RACE BREAKDOWN:

Average age of the team is 53, with one female identifying as two or more races and one female and three males identifying as white.



### DIVERSITY BREAKDOWN OF FEMALE EMPLOYEES (US)

	NUMBER OF EMPLOYEES*	AVERAGE AGE	LGBTQIA+
Asian	3	40	0
Black or Africa American	4	35	0
Hispanic or Latino	2	41	0
White	39	41	0
Two or More Races	3	50	0
Declined to Identify	4	40	1
<b>TOTAL</b>	<b>55</b>	<b>41</b>	<b>1</b>

### DIVERSITY BREAKDOWN OF MALE EMPLOYEES (US)

	NUMBER OF EMPLOYEES*	AVERAGE AGE	LGBTQIA+
Asian	4	40	0
Black or African American	0	0	0
Hispanic or Latino	6	41	0
White	49	41	3
Two or More Races	0	0	0
Declined to Identify	11	40	0
<b>TOTAL</b>	<b>70</b>	<b>41</b>	<b>3</b>

\*This employee count is current as of December 31, 2024, and may show a discrepancy from other statistics reflected in this ESG Report due to varied reporting cutoffs, employee attrition, and/or employees not self-reporting their demographics.

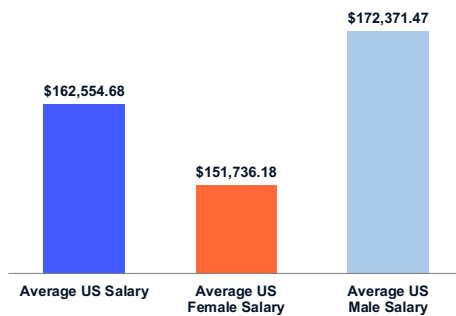
## Pay Equality

We prioritize recruiting and retaining a highly qualified workforce, offer merit-based opportunities to ensure professional growth and success, and incentivize high-performing employees through competitive salaries, granting of stock-based awards, as well as cash-based bonus awards.

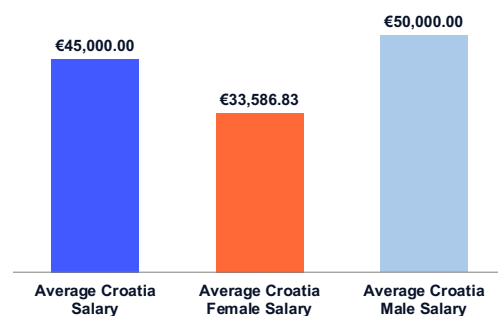
OptimizeRx provides equal employment opportunities to all employees and applicants for employment without regard to age, race (including hair texture and protective hairstyles), color, national origin (including language use and possession of a driver's license issued to persons unable to prove their presence in the United States is authorized under federal law), ancestry, citizenship, religion (including religious dress and grooming practices), gender, sexual orientation, gender identity, pregnancy (including childbirth, lactation, and related medical conditions), physical or mental disability (including HIV and AIDS), medical condition (including cancer and a record or history of cancer), requests or approved protected medical leaves, genetic information (including testing and characteristics), veteran status, uniformed service member status, domestic violence victim status, political affiliation, or any other status protected by federal, state, or local laws.

Equal employment opportunity applies to all aspects of employment, including, but not limited to, recruiting, hiring, placement, promotion, transfer, leave of absence, compensation, training, and all other terms, conditions and privileges of employment. OptimizeRx complies with all local, state, and federal regulations related to hiring practices, including verifying employment eligibility for all successful applicants.

### BASE SALARY FOR EMPLOYEES IN THE US [USD]:



### BASE SALARY FOR EMPLOYEES IN CROATIA [EUR]:



	SUM OF BASE SALARIES	AVERAGE BASE SALARY
Asian	\$1,102,806.48	\$157,543.78
Black or African American	\$609,124.32	\$152,281.08
Hispanic or Latino	\$913,692.00	\$114,211.50
White	\$12,261,774.84	\$139,338.35
Two or More Races	\$555,428.88	\$185,142.96
Declined	\$2,304,439.20	\$153,629.28
LGBTQIA+ STATUS	SUM OF BASE SALARIES	AVERAGE BASE SALARY
Yes	\$694,592.40	\$138,918.48
No	\$6,796,647.48	\$133,267.60
Declined to Identify	\$10,256,025.84	\$148,638.06

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## Wage Level

**US FEDERAL MINIMUM WAGE:**

\$15,000 annually or \$7.25/hr

**ENTRY WAGE FOR OPTIMIZERX:**

\$60K US DOLLARS

€22K EURO

**CEO BASE SALARY:** \$450,000

**AVERAGE US BASE SALARY:** \$162,555

**AVERAGE CROATIA BASE SALARY:** €45,642



## New Hires and Turnover

OptimizeRx strives to create significant economic value for our employees, stakeholders, and our communities through job opportunities and contribution to our economy. Employee recruitment and retention and investments in society are critical to our goal of mitigating the risks of job loss and poverty, particularly for those in more vulnerable populations.

### Demographics Breakdown of New Hires in 2024 (U.S.)

ETHNICITY	# OF MALES	MALE AVG AGE	# OF FEMALES	FEMALE AVG AGE	# OF LGBTQIA+ PERSONS	LGBTQIA+ AVG AGE
Asian	-	-	-	-	-	-
Black or African American	-	-	1	28	-	-
Hispanic or Latino	-	-	-	-	-	-
White	11	46	6	41	-	-
Two or more Races	-	-	-	-	-	-
Declined to Identify	1	38	-	-	-	-
<b>Totals</b>	<b>12</b>	<b>42</b>	<b>7</b>	<b>34.5</b>	<b>0</b>	<b>0</b>

### Rate of Turnover in 2024 (U.S.)

GENDER	ETHNICITIES	NUMBER	AVG AGE
Males	Asian, White, Two or More, Declined to Identify	14	51
Females	Asian, White, Two or More, Hispanic or Latino	13	44

### Rate of Turnover in 2024 (Croatia)

GENDER	ETHNICITIES	NUMBER	AVG AGE
Males	White	1	39
Females	White	2	36

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## Modern Slavery Mitigation

Modern slavery is a heinous crime and a morally reprehensible act that deprives a person's liberty and dignity for another person's gain. It is a real problem for millions of people around the world, including many in developed countries, who are being kept and exploited in various forms of slavery. Every company is at risk of being involved in this crime through its own operations and its supply chain.

OptimizeRx has a zero-tolerance approach to modern slavery and is fully committed to preventing slavery and human trafficking in any aspect of our operation and with our partners and vendors. As a health technology company selling sophisticated digital solutions, we do not have an extensive supply chain or sourcing partners that would make use of forced and child labor and therefore risks and ripple effects of the crime in our overall value chain relative to other companies is small. Nevertheless, this does not diminish the importance of the issue to our Company.

We ensure that our own workforce is free of any such crimes; and, therefore at the point of recruitment, appropriate checks in accordance with relevant laws are carried out on prospective employees, and our HR team works closely with the relevant teams in the local territories to make sure that pay and conditions are appropriately managed.

In accordance with our commitment to acting ethically and with integrity in all our business relationships, we intend to implement effective systems and controls to ensure Modern Slavery is not taking place in our supply chains.

A key part of supporting ethical standards is enabling our employees and all of our stakeholders to freely and safely speak up when there are reasonable grounds to suspect that our Company or our employees are not acting ethically or in accordance with laws and obligations. Concerns about compliance or ethical issues or illegal or unethical activities are to be reported in accordance with our Whistleblower Policy.

The OptimizeRx Human Rights Policy is available at <https://investors.optimizerx.com/esg/>.

## Health and Safety

Implementing and maintaining strong standards as they relate to the health, safety, and labor rights of our employees are of critical importance. OptimizeRx recognizes that physical, mental, and emotional wellbeing of our people is only becoming more important as we evolve and drive innovation that is reliant on human capital.

Our Company supports employees by offering a comprehensive and competitive benefits program which includes the following components:

- Medical, Dental, and Vision Insurance
- Group Life Insurance
- Short-Term and Long-Term Disability plans
- Employee Assistance Program (EAP) providing confidential and experienced counseling for employees dealing with issues that affect the lives and quality of their job performance

OptimizeRx pays approximately 87% of each employee's medical insurance premiums and 50% of the employee premium for dental and vision insurance.

Since 2022, we expanded our healthcare benefits for all employees and their families, subject to eligibility requirements, to include travel coverage to access needed healthcare that is not afforded to employees or their family members in their home States or where the necessary healthcare is only available 100 miles or more from where they reside.

Our workers' compensation insurance provides coverage for medical and rehabilitation expenses and a portion of lost wages to employees who sustain an injury on the job. As a company with low risk of work-related injuries, OptimizeRx has had no reported fatalities or workers' compensation claims filed resulting from injuries sustained at the workplace in the last three years.

In cases where employees need to take a leave of absence due to their own health condition or life circumstances, whether for an accident, injury, illness or pregnancy-related disability, OptimizeRx has multiple paid and unpaid leave and return-to-work policies catered to the locations where employees reside and their applicable laws on non-occupational medical and family leave. Additionally, all U.S. employees are eligible to take four continuous weeks of fully paid family leave for the birth or adoption of a child.

*We encourage all employees to take as much time off as reasonably needed to unwind from work. In an effort to promote a healthy work environment, the Company has implemented a paid time off policy which removes any cap on vacation time and allows each employee to take ownership of maintaining their own health and safety by determining how much time the employee might need away from work.*

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## Skills for the Future

The success of OptimizeRx is dependent on the skills, experience and efforts of our employees. A skilled workforce not only improves the Company's performance but also contributes to overall employee satisfaction and enhances human capital.

We continue to implement a Learning Management System where current and future training modules are presented and tracked for reporting purposes. To support the ongoing growth and development of our team, we have developed a Competency Model that will provide guidance for continued growth and development of our team in 2025. In 2024, we devoted \$32,557 to employee training in the form of team building, books, and seminars, on top of our annual trainings for compliance and onboarding purposes.

We offer other learning and development opportunities and resources to support our employees in achieving and enhancing their development objectives. We equip our managers with the skills and tools to provide ongoing coaching and feedback so employees can maximize their performance and potential, delivering success for our company and the employee.



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## Economic Contribution

Our quarterly and annual financial filings contain disclosures relating to revenues, operating costs, wages & benefits, payments to providers of capital, taxes paid, as well as other components related to our economic contribution. All of our public filings can be found on our website.

OptimizeRx has not received any form of financial assistance from federal, state or local governments during the reporting period.

## Focus on Innovation

Together with our clients, we are shaping a future where healthcare is more connected, effective, accessible, and centered on patient well-being. Innovation is the driver of our success in this effort. We aim to create more, and better, communication solutions that respond to the current unmet needs of the U.S. health system and anticipate future needs as they relate to patient care journeys. We are committed to enabling quality care and driving positive outcomes through the application of new technologies to foster connection. Our investments reflect our deep commitment to connect patients, providers, and life sciences brands for the purpose of driving faster and more effective treatment decisions.

We currently connect over 2 million U.S. healthcare providers and millions of their patients through a proprietary point-of-care network, and digital media channels using our Dynamic Audience Activation Platform (DAAP) and Micro-Neighborhood® targeting. Our proprietary technology platform enables us to curate privacy safe DTC audiences, dynamic HCP and DTC audiences, and effectively manage digital media campaigns for our advertiser clients (agencies, and manufacturer/brands) across our channel partner network. Our platform consists of a unified data intelligence technology stack, multiple cloud-based data warehouses, and in-house applications and application programming interface layers. Collectively, this platform enables us with a collaborative environment for data engineering, data science, and machine learning, an efficient method to curate privacy safe DTC audiences, and a scalable means to manage both point-of-care media campaigns and the supply-side inventory request volume. For the management of point-of-care media campaigns, the platform integrates advanced features of a Supply-Side Platform (SSP), allowing us to provide seamless access to an expansive range of point-of-care inventory via our strategic partnerships. As an SSP, our platform enables us to manage and optimize our point-of-care network's ad inventory, maximizing their revenue. On the demand side, our platform empowers our account and program managers to efficiently

manage our customers' campaign(s). Our technology is built on a scalable and secure architecture that supports high-performance data processing, real-time decisioning, and integration with third-party data providers.

These solutions have the power to align relevant communications about clinical trials or marketed therapies for doctors and patients in a way that drives meaningful healthcare interactions. Our technology helps life sciences organizations communicate with healthcare providers about treatment efficacy and directly connects patients with therapy information and financial assistance opportunities to help them make more informed personal healthcare decisions.

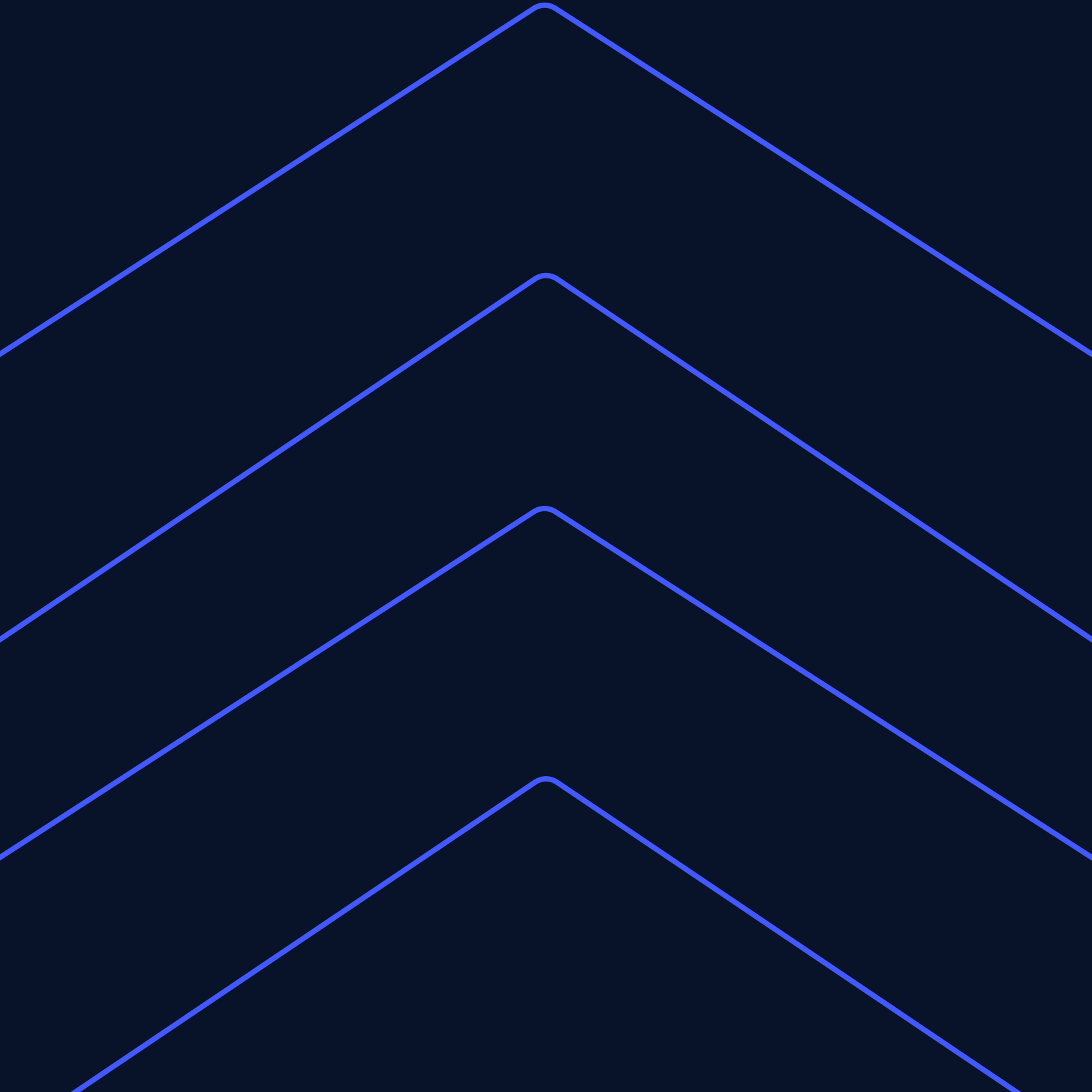
In this way, we help to address the growing prevalence of chronic conditions including the resulting cost and logistical challenges presented by the rising volume of specialty therapeutics, as well as the disconnectedness of the U.S. healthcare system.

Engagement models are becoming smarter across the board, with omni-channel strategies maturing and supporting large-scale go-to-market shifts within life sciences. Technology advancements such as ours continue to open the door to more sophisticated methods of supporting health care providers and patients in the complex U.S. healthcare ecosystem. We are helping our clients understand better where to focus health information resources for both health care providers and patients.

We will continue to invest in research and development efforts that have direct impact on population health challenges, including health communications, patient affordability, cost of care delivery, and equitable access to therapy.

For more detailed information on our technologies, please see our Annual Report on Form 10-K, our subsequent Quarterly Reports on Form 10-Q, and our other filings with the Securities and Exchange Commission.

# APPENDIX



# Appendix 1: SASB Sustainability Disclosure Topics & Metrics

## Environmental Footprint of Hardware Infrastructure

Accounting Metric	Category	SASB Code	Disclosure
(1) Total energy consumed (2) percentage grid electricity (3) percentage renewable	Quantitative	TC-IM-130a.1	<ol style="list-style-type: none"> <li>69,349.04 kWh in CY 2024</li> <li>100%</li> <li>OptimizeRx does not purchase renewable energy credits. However, some of the energy that OptimizeRx's purchases comes from renewables. Below is a summary of the share of renewable energy in each grid region where OptimizeRx operates. <ul style="list-style-type: none"> <li>42.1% New England Region</li> <li>22.1% Michigan Region</li> <li>42.4% Arizona / New Mexico Region</li> <li>57.4% Croatian Region</li> </ul> </li> </ol>
(1) Total water withdrawn (2) Total water consumed, percentage of each in regions with High or Extremely High Baseline Water Stress	Quantitative	TC-IM-130a.2	Water-related topics are not material for our business operations, so we do not report on this.
Discussion of the integration of environmental considerations into strategic planning for data center needs	Discussion and Analysis	TC-IM-130a.3	OptimizeRx does not manage its own data centers, but rather, purchases these services from service providers like AWS. OptimizeRx takes advantage of features that shift data center usage to off-peak times, which improves the sustainability of the energy mix and relieves pressure on the local grid.

## Data Privacy, Advertising Standards & Freedom of Expression

Accounting Metric	Category	SASB Code	Disclosure
Description of policies and practices relating to behavioral advertising and user privacy	Discussion and Analysis	TC-IM-220a.1	See <a href="https://www.optimizerx.com/privacy-policy">https://www.optimizerx.com/privacy-policy</a> .
Number of users whose information is used for secondary purposes	Quantitative	TC-IM-220a.2	None.
Total amount of monetary losses as a result of legal proceedings associated with user privacy	Quantitative	TC-IM-220a.3	\$0.00.
(1) Number of law enforcement requests for user information (2) number of users whose information was requested (3) percentage resulting in disclosure	Quantitative	TC-IM-220a.4	<ol style="list-style-type: none"> <li>Zero.</li> <li>Not Applicable.</li> <li>Not Applicable.</li> </ol>
List of countries where core products or services are subject to government-required monitoring, blocking, content filtering, or censoring	Discussion and Analysis	TC-IM-220a.5	Not Applicable.

## Data Security

Accounting Metric	Category	SASB Code	Disclosure
(1) Number of data breaches (2) percentage involving personally identifiable information (PII) (3) number of users affected	Quantitative	TC-IM-230a.1	<ol style="list-style-type: none"> <li>Zero.</li> <li>Not Applicable.</li> <li>Not Applicable.</li> </ol>
Description of approach to identifying and addressing data security risks, including use of third-party cybersecurity standards	Discussion and Analysis	TC-IM-230a.2	<p>OptimizeRx maintains an information security policy which lays out roles, responsibilities, and frameworks for data security risks.</p> <p>OptimizeRx has a SOC 2 Type 2 Certification for the Trust Services Criteria of Privacy, Confidentiality, Security, and Availability.</p>

## Employee Recruitment, Inclusion & Performance

Accounting Metric	Category	SASB Code	Disclosure
Percentage of employees that are (1) foreign nationals and (2) located offshore	Quantitative	TC-IM-330a.1	<ol style="list-style-type: none"> <li>0%</li> <li>17.6%</li> </ol> <p>Note: OptimizeRx Corporation only employees U.S. citizens located in the United States. However, OptimizeRx's subsidiary, CareSpeak Communications d.o.o., is based in Croatia and employs Croatians.</p> <p>The figure in #2 reflects the percentage of employees who work for CareSpeak Communications d.o.o. in Croatia—there are no other offshore employees.</p>
Employee engagement as a percentage	Quantitative	TC-IM-330a.2	22% of OptimizeRx employees completed the most recent (February 2025) employee engagement survey.
Percentage of (1) gender and (2) diversity group representation for (a) executive management, (b) non-executive management, (c) technical employees and (d) all other employees	Quantitative	TC-IM-330a.3	<p>While OptimizeRx is in the Internet and Media Services category, OptimizeRx does not break down its employee diversity statistics in this way.</p> <p>For an overview of the distribution of employees by gender and diversity group representation, see Talent Acquisition and Retention, Demographic Data in the main body of this ESG Report.</p>

## Intellectual Property Protection & Competitive Behavior

Accounting Metric	Category	SASB Code	Disclosure
Total amount of monetary losses as a result of legal proceedings associated with anticompetitive behavior regulations	Quantitative	TC-IM-520a.1	\$0.00.

# Appendix 2: ISS Corporate Disclosures

## Environmental Topics

ISS Code	Topic	Disclosure
E 543	Does the company disclose details on significant negative environmental impacts identified in the supply chain?	OptimizeRx sells solely technical services using remote cloud infrastructure and does not rely on physical goods.  Therefore, we have no significant negative environmental impacts in the supply chain.
E 22	Does the company disclose its climate change risks?	OptimizeRx sells solely technical services using remote cloud infrastructure and does not rely on physical goods.  OptimizeRx's customers are pharmaceutical companies. Climate change may make natural disasters more common. If this happens, pharmaceutical companies may lose production capacity and pull back on advertising spending, which may reduce the Services they buy from OptimizeRx.
E 23	Does the company disclose a climate change strategy?	OptimizeRx sells solely technical services using remote cloud infrastructure and does not rely on physical goods.  OptimizeRx's customers are pharmaceutical companies. Our sole climate change risk comes through our customers, but because we have no way to force them to mitigate their climate change risks, there is no reason for OptimizeRx to have a climate change strategy.
E 28	Does the company disclose climate change opportunities?	OptimizeRx sells solely technical services using remote cloud infrastructure and does not rely on physical goods.  Because OptimizeRx has no business in energy, natural resources, land use, water use, or related industries, OptimizeRx has no climate change opportunities to disclose.
E 35	Does the company disclose the impact of climate-related risks and opportunities on its businesses, strategy and financial planning?	OptimizeRx sells solely technical services using remote cloud infrastructure and does not rely on physical goods.  OptimizeRx's customers are pharmaceutical companies. Climate change may make natural disasters more common. If this happens, pharmaceutical companies may lose production capacity and pull back on advertising spending, which may reduce the Services they buy from OptimizeRx.  <b>Risks</b> Because these risks are speculative, they cannot be quantified and therefore there is no impact to report in OptimizeRx's strategy or financial planning.  <b>Opportunities</b> Because OptimizeRx has no business in energy, natural resources, land use, water use, or related industries, OptimizeRx has no climate change opportunities to disclose, and therefore no impacts to report on its strategy and financial planning.
E 36	Does the company disclose multiple scenarios for the potential impact of climate-related risks and opportunities on its businesses, strategy and financial planning?	OptimizeRx sells solely technical services using remote cloud infrastructure and does not rely on physical goods.  OptimizeRx's customers are pharmaceutical companies. Climate change may make natural disasters more common. If this happens, pharmaceutical companies may lose production capacity and pull back on advertising spending, which may reduce the Services they buy from OptimizeRx.  <b>Risks</b> The only risk scenario is a catastrophe that reduces our customers' spending. There are not multiple scenarios to discuss.  Because this risk is speculative, it cannot be quantified and therefore there is no impact to report in OptimizeRx's strategy or financial planning.  <b>Opportunities</b> Because OptimizeRx has no business in energy, natural resources, land use, water use, or related industries, OptimizeRx has no climate change opportunities to disclose, and therefore no impacts to report on its strategy and financial planning.
E 37	Does the company disclose a climate impact scenario that references 1.5°C limits?	OptimizeRx does not disclose a climate impact scenario that references 1.5°C limits because its sole risk scenario (a catastrophe that reduces our customers' spending) is not meaningfully different at the 1.5°C limit than at any other warming threshold.

E 64	Does the company disclose the percentage of energy used that is derived from renewable sources?	<p>OptimizeRx does not purchase renewable energy credits. Because we only operate a handful of small offices and have no industrial production or self-run data centers, purchasing renewable energy credits for these offices would have a very low impact and is not considered a priority at this time.</p> <p>However, when OptimizeRx buys energy from utilities, some of this energy is generated from renewable sources.</p> <p>The EPA's Power Profiler tool provides location-based emissions factors, which shows the following percentages of renewable energy generation for the electricity grids where OptimizeRx has offices:</p> <table border="1" data-bbox="695 457 1404 842"> <tr> <td data-bbox="695 457 1047 646"> <b>New England Region</b>  22.5% Nuclear  08.4% Hydro  03.3% Wind  04.3% Biomass  03.6% Solar  00.0% Geothermal  <u>42.1% Total</u> </td> <td data-bbox="1047 457 1404 646"> <b>Michigan</b>  10.1% Nuclear  00.5% Hydro  08.7% Wind  01.5% Biomass  01.3% Solar  00.0% Geothermal  <u>22.1% Total</u> </td> </tr> <tr> <td data-bbox="695 646 1047 842"> <b>Arizona / New Mexico Region</b>  18.9% Nuclear  02.8% Hydro  08.1% Wind  00.3% Biomass  08.6% Solar  03.7% Geothermal  <u>42.4% Total</u> </td> <td data-bbox="1047 646 1404 842"> <b>Croatia</b>  <u>57.4% Total</u> </td> </tr> </table> <p>Sources:  United States: <a href="https://www.epa.gov/eGRID/power-profiler/">https://www.epa.gov/eGRID/power-profiler/</a>.  Croatia: <a href="https://www.researchgate.net/figure/Emission-factor-of-electricity-in-Croatia-based-on-the-national-electricity-grid-mix_tbl1_324513887">https://www.researchgate.net/figure/Emission-factor-of-electricity-in-Croatia-based-on-the-national-electricity-grid-mix_tbl1_324513887</a></p>	<b>New England Region</b> 22.5% Nuclear 08.4% Hydro 03.3% Wind 04.3% Biomass 03.6% Solar 00.0% Geothermal <u>42.1% Total</u>	<b>Michigan</b> 10.1% Nuclear 00.5% Hydro 08.7% Wind 01.5% Biomass 01.3% Solar 00.0% Geothermal <u>22.1% Total</u>	<b>Arizona / New Mexico Region</b> 18.9% Nuclear 02.8% Hydro 08.1% Wind 00.3% Biomass 08.6% Solar 03.7% Geothermal <u>42.4% Total</u>	<b>Croatia</b> <u>57.4% Total</u>
<b>New England Region</b> 22.5% Nuclear 08.4% Hydro 03.3% Wind 04.3% Biomass 03.6% Solar 00.0% Geothermal <u>42.1% Total</u>	<b>Michigan</b> 10.1% Nuclear 00.5% Hydro 08.7% Wind 01.5% Biomass 01.3% Solar 00.0% Geothermal <u>22.1% Total</u>					
<b>Arizona / New Mexico Region</b> 18.9% Nuclear 02.8% Hydro 08.1% Wind 00.3% Biomass 08.6% Solar 03.7% Geothermal <u>42.4% Total</u>	<b>Croatia</b> <u>57.4% Total</u>					
E 65	Does the company disclose its aggregate energy consumption from renewable sources?	OptimizeRx's energy consumption from renewable sources is proportional to the amount of electricity supplied by the local grid from renewable sources. See E 64 above for more information.				
E 67	Does the company disclose the percentage of energy used that is derived from non-renewable sources?	OptimizeRx's energy consumption from non-renewable sources is proportional to the amount of electricity supplied by the local grid from non-renewable sources. See E 64 above for more information.				
E 68	Does the company disclose its aggregated energy consumption from non-renewable sources?	OptimizeRx's energy consumption from non-renewable sources is proportional to the amount of electricity supplied by the local grid from non-renewable sources. See E 64 above for more information.				
E 72	Does the company disclose the absolute amount of energy conserved through its energy conservation programmes?	OptimizeRx has no energy conservation programs because we only operate a handful of small offices and have no industrial production or self-run data centers. Efforts to reduce our consumption further would yield miniscule returns on an already low impact. Conservation programs are not considered a priority at this time.				
E 74	Does the company disclose the amount of total investment in energy conservation programmes?	OptimizeRx has no energy conservation programs because we only operate a handful of small offices and have no industrial production or self-run data centers. Efforts to reduce our consumption further would yield miniscule returns on an already low impact. Conservation programs are not considered a priority at this time.				
E 75	Does the company disclose total savings or profits achieved from energy conservation programmes?	OptimizeRx has no energy conservation programs because we only operate a handful of small offices and have no industrial production or self-run data centers. Efforts to reduce our consumption further would yield miniscule returns on an already low impact. Conservation programs are not considered a priority at this time.				
E 96	Does the company disclose a clear approach to reduce energy consumption from non-renewable sources?	OptimizeRx has no plans to purchase renewable energy credits or otherwise shift to more renewable sources of electricity. Because we only operate a handful of small offices and have no industrial production or self-run data centers, such measures would have a very low impact and are not considered a priority at this time.				
E 102	In the company's most recent CDP disclosure, which CDP option has been selected as best describing its risk management procedures with regard to climate change risks and opportunities?	OptimizeRx has not disclosures with the Carbon Disclosure Project.				

E 107	Does the company disclose metrics used to assess climate-related risks and opportunities in line with its strategy and risk management process?	<p>OptimizeRx sells solely technical services using remote cloud infrastructure and does not rely on physical goods.</p> <p>OptimizeRx's customers are pharmaceutical companies. Climate change may make natural disasters more common. If this happens, pharmaceutical companies may lose production capacity and pull back on advertising spending, which may reduce the Services they buy from OptimizeRx.</p> <p><b>Risks</b> The only risk scenario is a catastrophe that reduces our customers' spending.</p> <p>Because this risk is speculative, it cannot be quantified and therefore there is no metric to report on.</p> <p><b>Opportunities</b> Because OptimizeRx has no business in energy, natural resources, land use, water use, or related industries, OptimizeRx has no climate change opportunities to disclose, and therefore no metric to report on.</p>
E 108	What frequency of monitoring does the company disclose for their risk management procedures in their most recent CDP disclosure?	OptimizeRx has not disclosures with the Carbon Disclosure Project.
E 110	Does the company disclose board oversight of climate-related risks and opportunities?	<p>The Nominating and Governance Committee of the Board of Directors has oversight of all environmental, social, and governance topics, which includes climate-related risks and opportunities.</p> <p>See Nominating and Governance Committee Charter, paragraph (h) on Page 2, available at <a href="https://investors.optimizerx.com/corporate-governance/governance-overview">https://investors.optimizerx.com/corporate-governance/governance-overview</a>. <a href="#">Direct Link to PDF</a></p>
E 199	Does the company publicly report metrics on water use?	<p>OptimizeRx does not publicly report metrics on water use because it only operates a handful of small offices and has no industrial production or self-run data centers.</p> <p>Because OptimizeRx's water usage is related directly to the water that people use each day for drinking and cleaning (that would occur even if OptimizeRx did not employ them) there is no way to reduce this and therefore no reason to report on it.</p>
E 200	Does the company disclose its total water withdrawal?	<p>OptimizeRx does not disclose total water withdrawal because it only operates a handful of small offices and has no industrial production or self-run data centers.</p> <p>Because OptimizeRx's water usage is related directly to the water that people use each day for drinking and cleaning (that would occur even if OptimizeRx did not employ them) there is no way to reduce this and therefore no reason to report on it.</p>
E 202	Does the company disclose its water usage by source?	<p>OptimizeRx does not disclose water usage by source because it only operates a handful of small offices and has no industrial production or self-run data centers.</p> <p>Because OptimizeRx's water usage is related directly to the water that people use each day for drinking and cleaning (that would occur even if OptimizeRx did not employ them) there is no way to reduce this, including with respect to any particular sources which may have greater or lesser environmental impacts, and therefore no reason to report on this.</p>
E 203	Does the company disclose its water consumption from areas with high water stress?	<p>OptimizeRx does not disclose water consumption from areas with high water stress because it only operates a handful of small offices and has no industrial production or self-run data centers.</p> <p>Because OptimizeRx's water consumption is related directly to the water that people use each day for drinking and cleaning (that would occur even if OptimizeRx did not employ them) there is no way to reduce this or switch to a less-stressed source, and therefore there is no reason to report on this.</p>
E 208	Does the company disclose metrics on its wastewater discharge?	<p>OptimizeRx does not disclose its wastewater discharge because it only operates a handful of small offices and has no industrial production or self-run data centers.</p> <p>Because OptimizeRx's wastewater discharge is related directly to the water that people use each day for drinking and cleaning (that would occur even if OptimizeRx did not employ them) there is no way to reduce this and therefore no reason to report on it.</p>
E 210	Does the company disclose metrics on water recycled?	OptimizeRx does not engage in water recycling because it only operates a handful of small offices and has no industrial production or self-run data centers.
E 553	What is the disclosed proportion of corporate operations in high water stress areas?	<p>OptimizeRx does not disclose its proportion of corporate operations in high water stress areas because it only operates a handful of small offices and has no industrial production or self-run data centers.</p> <p>Because OptimizeRx's water consumption is related directly to the water that people use each day for drinking and cleaning (that would occur even if OptimizeRx did not employ them) there is no way to reduce this or switch to a less-stressed source, and therefore there is no reason to report on this.</p>

E 554	Does the company disclose adapted water management in areas of high water stress?	<p>OptimizeRx does not use adapted water management in areas of high water stress because it only operates a handful of small offices and has no industrial production or self-run data centers.</p> <p>Because OptimizeRx's water consumption is related directly to the water that people use each day for drinking and cleaning (that would occur even if OptimizeRx did not employ them) such measures would have a very low impact and are not considered a priority at this time.</p>
E 555	Does the company disclose risk evaluation that covers accessibility, availability or quality in areas of high water stress?	<p>OptimizeRx does not disclose a risk evaluation covering accessibility, availability or quality in areas of high water stress because it only operates a handful of small offices and has no industrial production or self-run data centers which do not meaningfully rely on water sources for their operation.</p> <p>A problem in water sources would not change OptimizeRx's day-to-day operations, and is therefore not material.</p>
E 556	Does the company disclose risk evaluation that covers water accessibility in areas of high water stress?	<p>OptimizeRx does not disclose a risk evaluation covering accessibility in areas of high water stress because it only operates a handful of small offices and has no industrial production or self-run data centers which do not meaningfully rely on water sources for their operation.</p> <p>A problem in water sources would not change OptimizeRx's day-to-day operations, and is therefore not material.</p>
E 128	Does the company disclose metrics on its hazardous air pollutants (HAP) emissions?	No, because OptimizeRx sells solely technical services using remote cloud infrastructure and produces no hazardous air pollutants.
E 162	Does the company disclose information about non-hazardous waste?	<p>OptimizeRx does not disclose information about non-hazardous waste because its only waste is ordinary office waste from a handful of small offices.</p> <p>Beyond this, OptimizeRx has no industrial production or other operations that produce waste.</p>
E 163	Does the company disclose metrics on its non-hazardous waste generated?	<p>OptimizeRx does not disclose metrics on non-hazardous waste because its only waste is ordinary office waste from a handful of small offices.</p> <p>Beyond this, OptimizeRx has no industrial production or other operations that produce waste.</p>
E 165	Does the company disclose the percentage of non-hazardous waste recycled?	<p>OptimizeRx does not disclose information about the percentage of non-hazardous waste recycled because its only waste is ordinary office waste from a handful of small offices. In those offices, OptimizeRx uses the recycling bins that its landlords provide.</p> <p>Beyond this, OptimizeRx has no industrial production or other operations that produce waste that could be recycled.</p>
E 166	Does the company disclose the percentage of non-hazardous waste incinerated?	OptimizeRx does not incinerate any waste, non-hazardous or otherwise.
E 167	Does the company disclose the percentage of non-hazardous waste landfilled?	OptimizeRx does not disclose information about the percentage of non-hazardous waste sent to landfills because its only waste is ordinary office waste from a handful of small offices. Beyond this, OptimizeRx has no industrial production or other operations that produce waste that could be sent to a landfill.
E 175	Does the company disclose a production waste management programme?	<p>OptimizeRx uses DocuSign to manage its contracting process, which reduces paper usage. OptimizeRx discloses the amount of paper saved in its ESG Report each year.</p> <p>Otherwise, OptimizeRx does not disclose a waste management program because its only waste is ordinary office waste from a handful of small offices. Any efforts to further reduce waste would have a very low impact and are not considered a priority at this time.</p>
E 170	Does the company disclose a production waste recycling programme?	<p>OptimizeRx has no industrial production, and therefore no production waste recycling program.</p> <p>Otherwise, OptimizeRx's only waste is ordinary office waste from a handful of small offices. In those offices, OptimizeRx uses the recycling bins that its landlords provide.</p>
E 176	Does the company disclose a packaging waste management programme?	<p>OptimizeRx does not disclose a packaging waste management program because it uses no packaging in its operations.</p> <p>OptimizeRx sells solely technical services using remote cloud infrastructure and does not produce physical goods.</p>
E 184	Does the company disclose quantitative information on packaging and packaging materials?	<p>OptimizeRx does not disclose quantitative information on packaging and packaging materials because it uses no packaging in its operations.</p> <p>OptimizeRx sells solely technical services using remote cloud infrastructure and does not produce physical goods.</p>
E 185	Does the company disclose the total weight of packaging and packaging materials?	OptimizeRx does not disclose the total weight of packaging and packaging materials because it uses no packaging in its operations.

		OptimizeRx sells solely technical services using remote cloud infrastructure and does not produce physical goods.
E 186	Does the company disclose the percentage of packaging and packaging materials made from recycled or renewable materials?	OptimizeRx does not disclose the percentage of packaging and packaging materials made from recycled or renewable materials because it uses no packaging in its operations.  OptimizeRx sells solely technical services using remote cloud infrastructure and does not produce physical goods.
E 187	Does the company disclose the percentage of packaging and packaging materials that is recyclable or compostable?	OptimizeRx does not disclose the percentage of packaging and packaging materials that is recyclable or compostable because it uses no packaging in its operations.  OptimizeRx sells solely technical services using remote cloud infrastructure and does not produce physical goods.
E 188	Does the company describe strategies to reduce the environmental impact of packaging throughout its lifecycle?	OptimizeRx does not describe strategies to reduce the environmental impact of packaging throughout its lifecycle because it uses no packaging in its operations.  OptimizeRx sells solely technical services using remote cloud infrastructure and does not produce physical goods.
E 604	Does the company disclose metrics on its total waste?	OptimizeRx does not disclose metrics on its total waste because its only waste is ordinary office waste from a handful of small offices. Beyond this, OptimizeRx has no industrial production or other operations that produce waste that could be sent to a landfill.  Because any efforts to further reduce waste would have a very low impact, reporting on total waste is not considered a priority at this time.

## Social Topics

ISS Code	Topic	Disclosure
S 358	Does the company disclose that it provides training on human trafficking and slavery to employees responsible for supply chain management?	OptimizeRx does not provide training on human trafficking and slavery to employees responsible for supply chain management because OptimizeRx does not purchase goods or services with a risk of human trafficking or slavery in their supply chain.  For example, there is no risk of human trafficking associated with OptimizeRx's core purchases, such as purchasing anonymized patient claims data from a data provider or cloud computing services from Amazon Web Services.
S 381	Does the company sustainability disclosure identify specific salient risks that its activities and business relationships pose on human rights?	OptimizeRx does not identify and disclose specific salient risks regarding human rights because it does not purchase goods abroad and its material vendors are U.S.-based technology companies, like Amazon Web Services.
S 391	Does the company disclose a specific policy on conflict minerals?	OptimizeRx does not disclose a specific policy on conflict minerals because OptimizeRx does not purchase conflict minerals, nor does OptimizeRx purchase goods that rely on conflict minerals in their supply chain.
S 392	Does the company disclose a policy on conflict minerals that references external standards?	OptimizeRx does not disclose a specific policy on conflict minerals that references external standards because OptimizeRx does not purchase conflict minerals, nor does OptimizeRx purchase goods that rely on conflict minerals in their supply chain.
S 393	Does the company disclose a policy on conflict minerals that includes due diligence measures for tracing and sourcing?	OptimizeRx does not disclose a specific policy on conflict minerals that includes due diligence measures for tracing and sourcing because OptimizeRx does not purchase conflict minerals, nor does OptimizeRx purchase goods that rely on conflict minerals in their supply chain.
S 471	Does the company disclose the Near Miss Frequency Rate (NMFR)?	OptimizeRx does not disclose the Near Miss Frequency Rate (NMFR) because it only operates a handful of small offices and has no production facilities where (severe) accidents are likely to occur.
S 581	Does the company disclose whether it is certified to ISO 45001 (Occupational health and safety management systems)?	OptimizeRx is not certified to ISO 45001 (Occupational health and safety management systems) because it only operates a handful of small offices and has no production facilities where (severe) accidents are likely to occur.
S 490	Does the company provide country-by-country figures on payments to governments?	OptimizeRx does not make payments to governments other than taxes and similar costs arising from its operations.
S 485	Countries for which the company discloses figures on payments to governments:	OptimizeRx does not make payments to governments other than taxes and similar costs arising from its operations.
S 585	Does the company embed in a public policy a prohibition on insider trading?	OptimizeRx publishes its policy prohibiting insider trading on its investor website at <a href="https://investors.optimizerx.com/corporate-governance/governance-overview">https://investors.optimizerx.com/corporate-governance/governance-overview</a> .  Direct link: <a href="https://investors.optimizerx.com/static-files/24176b56-8b6b-4286-8900-bf9cfd3e79e2">https://investors.optimizerx.com/static-files/24176b56-8b6b-4286-8900-bf9cfd3e79e2</a>
S 189	Does the company disclose a clear approach to assess and manage risks associated with the inclusion of harmful chemicals in products?	OptimizeRx does not disclose an approach to assess and manage risks associated with the inclusion of harmful chemicals in products because OptimizeRx sells solely technical services using remote cloud infrastructure and does not produce physical goods.  It is not possible to include chemicals in OptimizeRx's services, harmful or otherwise.

S 190	Does the company disclose quantitative targets towards managing risks associated with the inclusion of harmful chemicals in products?	OptimizeRx does not disclose quantitative targets towards managing risks associated with the inclusion of harmful chemicals in products because OptimizeRx sells solely technical services using remote cloud infrastructure and does not produce physical goods.  It is not possible to include chemicals in OptimizeRx's services, harmful or otherwise.
S 191	Does the company disclose an implementation timeline towards managing risks associated with the inclusion of harmful chemicals in products?	OptimizeRx does not disclose an implementation timeline towards managing risks associated with the inclusion of harmful chemicals in products because OptimizeRx sells solely technical services using remote cloud infrastructure and does not produce physical goods.  It is not possible to include chemicals in OptimizeRx's services, harmful or otherwise.
S 192	Does the company disclose the existence of monitoring procedures for managing risks associated with the inclusion of harmful chemicals in products?	OptimizeRx does not disclose the existence of monitoring procedures for managing risks associated with the inclusion of harmful chemicals in products because OptimizeRx sells solely technical services using remote cloud infrastructure and does not produce physical goods.  It is not possible to include chemicals in OptimizeRx's services, harmful or otherwise.
S 315	Does the company disclose information on the number of product recalls and total units recalled?	OptimizeRx does not disclose information on the number of product recalls and total units recalled because OptimizeRx sells solely technical services using remote cloud infrastructure and does not produce physical goods.  It is not possible for OptimizeRx's services to be recalled.

# Appendix 3: Emissions Calculations Methodology

Methodology for Estimating CO<sub>2</sub>-e Emissions

OptimizeRx Corporation – All Locations

2024 Analysis Year

## List of Facilities

- 7640 Dixie Highway, Suite 175, Clarkston, Michigan 48346
- 260 Charles St., Suite 302, Waltham, MA 02453
- 10799 N. 90<sup>th</sup> Street, Suite 200 Scottsdale, AZ 85260
- Ulica Kraljice Jelene 6, 10000 Zagreb

## Scope 1

### Stationary Combustion

Emissions Factor for Natural Gas

OptimizeRx used the U.S. Energy Information Administration's conversion factor<sup>1</sup> of 120.85 lbs of CO<sub>2</sub>e per MCF of natural gas to convert this into CO<sub>2</sub> equivalent (CO<sub>2</sub>e) according to the following calculation.

$MCF * 120.85 = \text{lbs of CO}_2\text{e}$

OptimizeRx converted pounds CO<sub>2</sub>e to metric tons CO<sub>2</sub>e by dividing the pounds by 2204.6.

### Mobile Combustion

OptimizeRx owns no mobile combustion equipment (e.g. passenger cars, heavy duty vehicles, construction equipment, etc.) at any facility, so no mobile combustion emissions calculation is warranted according to EPA guidelines. GHG emissions from mobile combustion are therefore assumed to be 0 metric tons.

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<sup>1</sup> [https://www.eia.gov/environment/emissions/co2\\_vol\\_mass.php](https://www.eia.gov/environment/emissions/co2_vol_mass.php).

## Fugitive Emissions

OptimizeRx reported the following devices with cooling features:

- Michigan: Refrigerator x1
- Massachusetts: Refrigerator x1
- Arizona: Refrigerator x1; Ice Maker x1
- Croatia (Zagreb): Refrigerator x1; Air Conditioner x3

The facilities reported no leaks, retirement, or purchase of gas in relation to the refrigerant equipment in the 2024 reporting year. Therefore, a fugitive emissions calculation is not warranted according to EPA guidelines. GHG emissions from fugitive sources are therefore assumed to be 0 metric tons.

This also means that OptimizeRx has no Hydrofluorocarbon (HFC) emissions to report for 2024.

## Scope 2

OptimizeRx purchased no electricity from alternative sources nor any renewable energy credits. Therefore, a market-based emissions factor is not appropriate and OptimizeRx calculated emissions using a location-based emissions factor for purchased electricity from all facilities.

OptimizeRx used the following sources for its emissions factors:

- U.S. Facilities: <https://www.epa.gov/egrid/detailed-data> at tab SRL23, column Z, reporting “eGRID subregion annual CO2 equivalent total output emission rate (lb/MWh).”
- Croatian Facilities: <https://www.carbondi.com/#electricity-factors/all-year-country-details/653fb8877422340e1f6b87e0/> available at [https://www.carbondi.com/#electricity-factors/?view\\_363\\_search=croatia&view\\_363\\_page=1](https://www.carbondi.com/#electricity-factors/?view_363_search=croatia&view_363_page=1).

OptimizeRx provided utility bills from all applicable utility companies for calendar year 2024.

OptimizeRx converted all units into kWh for purposes of calculating total lbs of CO<sub>2</sub>e, which was then converted into metric tons.

OptimizeRx reports greenhouse gas emissions under the SASB standard, which requires information on the following emissions gases:

1. carbon dioxide (CO<sub>2</sub>)
2. methane (CH<sub>4</sub>)
3. nitrous oxide (N<sub>2</sub>O)
4. hydrofluorocarbons (HFCs)
5. perfluorocarbons (PFCs)
6. sulfur hexafluoride (SF<sub>6</sub>)
7. nitrogen trifluoride (NF<sub>3</sub>)

However, OptimizeRx was unable to report in calendar year 2024 on the following gases for the following respective reasons:

- **perfluorocarbons (PFCs)**: OptimizeRx is not engaged in the manufacture of aluminum products.
- **sulfur hexafluoride (SF6)**: OptimizeRx is unable to find location-based emissions factors for SF6.
- **nitrogen trifluoride (NF3)**: OptimizeRx is not engaged in the manufacture of electronics, photovoltaic cells, and flat panel displays.

## Other Assumptions

- The company does not own, manage, or directly pay for utilities.
- The company does not purchase renewable energy credits (RECs).
- The alternate methods of determining market-based emissions factors were not applicable to the facilities. Therefore, the use of a location-based emissions factor is most appropriate.

## Important Cautions Regarding Forward Looking Statements

This ESG Report contains forward-looking statements within the meaning of the Private Securities Litigation Reform Act of 1995. Words such as “anticipates”, “believes”, “estimates”, “expects”, “forecasts”, “intends”, “plans”, “projects”, “targets”, “designed”, “could”, “may”, “should”, “will” or other similar words and expressions are intended to identify these forward-looking statements. All statements that reflect the Company’s expectations, assumptions, projections, beliefs or opinions about the future, other than statements of historical fact, are forward-looking statements, including, without limitation, statements relating to the Company’s growth, business plans and future performance. These forward-looking statements are based on the Company’s current expectations and assumptions regarding the Company’s business, the economy, and other future conditions. The Company disclaims any intention or obligation to publicly update or revise any forward-looking statements, whether because of new information, future events, or otherwise, except as required by applicable law. Forward-looking statements are inherently subject to risks and uncertainties, some of which cannot be predicted, or quantified. Future events and actual results could differ materially from those set forth in, contemplated by, or underlying the forward-looking statements. The risks and uncertainties to which forward-looking statements are subject include, but are not limited to, the effect of government regulation, competition, and other risks summarized in the Company’s Annual Report on Form 10-K for the fiscal year ended December 31, 2023, its subsequent Quarterly Reports on Form 10-Q, and its other filings with the Securities and Exchange Commission.



# OptimizeRx

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