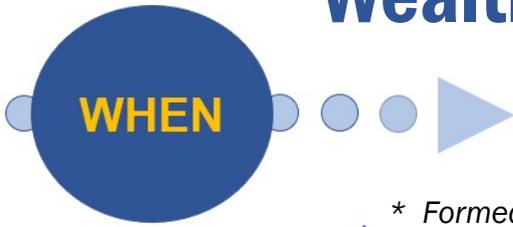


# Wealth-Health Executive Network\*



\* Formed in 2017 as the Senior Healthcare Executive Forum (SHEF), our new name, the **Wealth-Health Executive Network (WHEN)** reflects the evolving interests and needs of our members as the Integration of Wealth and Health is changing financial services.

**WHEN** is a unique, member driven network that facilitates member direct connections among peers, leaders and industry influencers from finance, policy, caregiving and medicine. Participation includes:

- **Topical discussions** and presentations to **keep you current** on **evolving issues** across medical, care and financial services, and their potential **implications** for your clients and your firm
- Industry **Best Practices** to help you determine the most **appropriate Wealth-Health strategies for your situation**
- **Thought Leadership** to help you keep your organization and clients informed about **private sector and public policy direction and implications**
- Members receive access **Wealth-Health Integration diagnostic tools** to determine readiness within their firms or distribution channels, and potential opportunities
- **On call consultation** – for a sounding board or for help to **assimilate and socialize information** and develop **tactics or strategies to fit a specific situation**
- Access to a range of **front line support tools** to assist your clients, strengthen relationships and build your business.

## For more information, contact:

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You promise your clients  
you will be there **in this  
moment...**



**...but how well are you really preparing them?**

## Health and Care Funding Is Changing Financial Services

**53 million**

Number of **Americans providing care** for a loved one. On average, over 20 hours per week.

**\$500 Billion**

Value of **unpaid caregiving**. This does not include out of pocket expenses or lost wages.

**#1**

Healthcare costs are the **#1 financial concern** for both retirees and pre-retirees.

**66%**

Percentage of **bankruptcies** caused by medical related financial issues such as not able to pay bills or lost time at work.

**1,119**

Number of **federal healthcare related bills** proposed in 2021. New federal and state laws will change health care and funding planning.

**90,000**

Number of **venture backed healthcare companies**. Medical and healthcare advances impact not just consumers' health, but their costs and how they will pay for it.

**WHEN**

**The Wealth-Health Executive Network** will help you “**connect the dots**” among health, care and financial services to **protect and grow your business**.