

Senior Healthcare Executive Forum (SHEF)

...Helping Members Connect the Dots



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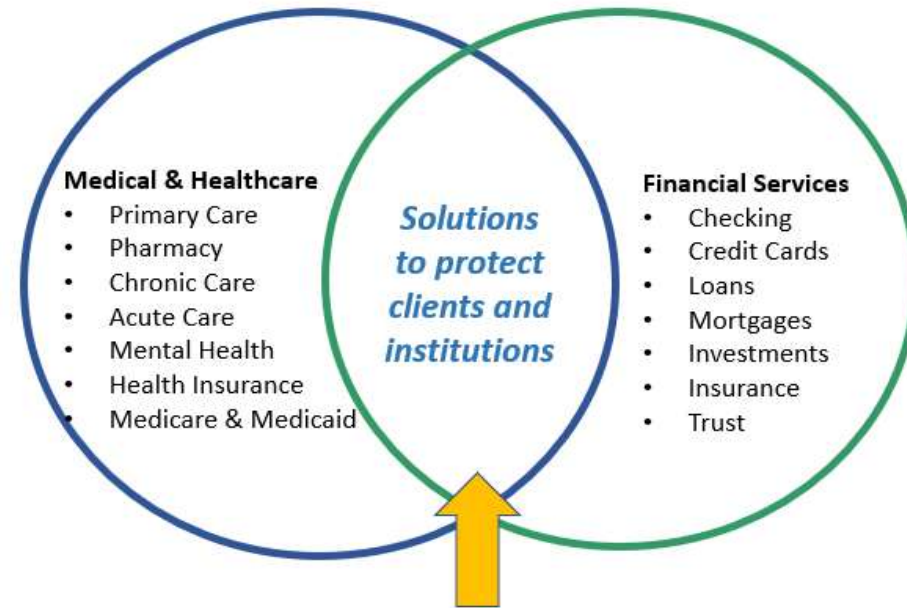
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Contents



- Importance to Financial Institutions
- SHEF overview
- Member Benefits
- Meetings



SHEF helps members understand direction, implications and opportunities for Financial Institutions and their clients

Health Care and Funding are Important to Financial Institutions



- Health and Care are the greatest “**known unknowns**” in ALL financial and life plans – regardless of age or wealth.
- These unknowns cut **across generations**
- **Covid** has driven consumer understanding of, and focus on, the links between health, care and finance.
- Clients are **committed** to the firms who helped them connect these dots

It's not just investments and insurance:

- Managing and mitigating health costs opens many opportunities, and **all products and services are involved** – from savings and transactions to credit cards and mortgages
- Clients who manage their health are **better credit risks**
- Clients who plan for health and care funding avoid liquidity events that can destroy **savings and portfolios**

SHEF helps members spot the opportunities and create strategies to realize their current and future potential.

SHEF Overview



- SHEF is a study & networking group. It brings together executives from different sectors of the **financial services** and **medical & healthcare industries**.
- SHEF helps members **understand health and care funding issues from a “360° perspective”** and how to **protect their clients and their institutions**.
- SHEF views health and care through a financial lens to uncover **financial impacts and opportunities**
- Discussions include:
 - Medical issues and their **financial implications**
 - Care and **funding** it
 - **Impacts on financial institution** clients, products and profitability
 - **Opportunities** to build your business and profitability

Member Benefits



- Participation in the “**network**” – on-line, in-person and informal
- **Associates from your firm** may join most meetings space permitting (nominal cost for in-person meetings)
- Access to a “**library**” of all past SHEF meetings to socialize, educate and discuss across your firm:
 - Speaker decks and handouts
 - Research reports
 - Reading lists
 - “Zoom” recordings (‘20 and ‘21)
- Input to direct **Meeting Topics and Speakers**
- Input to direct **Research & Study Topics**
- **Best Practice** Round Robin opportunity

Meetings



- **Meeting topics** are developed with input from our members. We call on “subject experts” from medical and caregiving professions, public policy and financial services to facilitate our sessions. The roundtable format facilitates an exchange of the broad range of perspectives that different industries bring to the shared challenges of senior health & care funding. [Click here](#) for past meeting topics.
- For **2021**, SHEF meets via Zoom on the **3rd Tuesday** of each month at 3:00-4:30 (Eastern).
 - 1st hour: Member requested **topic focus** – presentation and discussion.
 - Next 30 Min: Continuation and/or open discussion at **member discretion**
- Format for **2022**: TBD by member polling. (Monthly remote as in 2021 , two Airport Fly-ins, Combination)

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