

# Senior Healthcare Executive Forum (SHEF)

...Helping Members Connect the Dots



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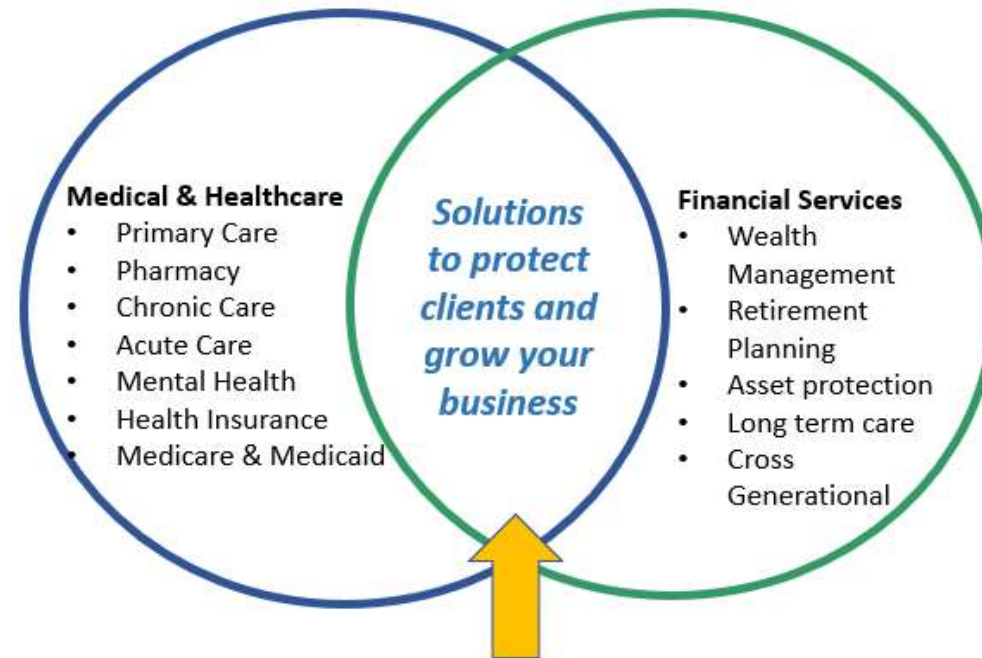
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SHEF helps members understand direction, implications and opportunities for Advisory and Product firms and their clients

# Funding Health & Care Creates Opportunities for Advice and Sales



- 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
- Managing and mitigating health costs can use **a broad range of products and services**
- Clients who plan for health and care funding avoid liquidity events that can destroy **portfolios**

**SHEF** helps members create strategies to realize their potential.

# SHEF Overview



- SHEF is a study & networking group. It brings together executives from different sectors of the **financial** and **medical and healthcare industries**.
- SHEF helps members form a **“360° perspective”** on medicine, health, care, government programs, public policy **and financing it all** too.
- SHEF views health and care through a financial lens to uncover ways **to protect and advance members’ clients and institutions**.
- Discussions include:
  - Medical issues and their **expense implications**
  - Care and **funding** it
  - **Impacts** on financial clients, products and profitability
  - **Capabilities** 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 on the **3<sup>rd</sup> Tuesday** of each month via Zoom 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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For more information about SHEF, please contact:

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