

SHEF is now WHEN

Nov. 15, 2021 - SHEF (Senior Healthcare Executive Forum), formed in 2017, focused on medical and care cost impacts on seniors' retirement plans. Covid accelerated recognition that these costs can occur at any time and that retirement events, like health events, are unpredictable. In response, members expanded the charter and changed the name to reflect the tight integration of wealth and health across lifetimes culminating in retirement.

The new name, the **Wealth-Health Executive Network (WHEN)** reflects the expanded charter, enhanced benefits, and the evolving needs of members. It also accents the urgency of financing health and care over lifetimes and generations.

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

- Interactive discussions on **topical issues** led by a wide range of subject matter experts,
- Learning relevant **Best Practices** in different organizations,
- Access to the **WHEN Members' Thought Leadership Library** to keep informed about private sector and public policy direction and implications,
- Wealth-Health Integration "**readiness**" **diagnostic tools**,
- **On call consultation** to discuss issues, strategies and tactics, and
- Access to **front-line support tools**.

According to Bob Grieb, Co-Founding Director, "It is increasingly clear that addressing senior health and care funding requires looking at Wealth-Health Integration broadly – and much earlier. Any discussion of health, care, or funding them inevitably leads to seniors and their retirement issues. Our membership agrees that **WHEN** better reflects the breadth of key issues member firms and their clients face."

"The Covid 19 pandemic has accelerated broad consumer awareness of the linkages between health and finance, and the needs for caregiving at many different levels." notes Heywood Sloane, Co-Founding Director. "The implications are substantial," he continued, "and financial services firms will be expected to understand and address these issues. The integration of wealth and health is changing financial services. Understanding Wealth-Health Integration provides opportunities beyond investments and insurance impacting mortgages, other credit, and savings products as well. **WHEN** provides members with a network and information to stay abreast of important trends that impact clients and our businesses."

About DSG.

The Diversified Services Group, Inc. (DSG) has served the financial services industry since 1989. The focus on Wealth-Health Integration began in the early 2000's when the importance and impact of health care and funding on successful retirement became clear. It was equally clear that many firms and advisors do not recognize the breadth of this impact, the opportunities presented, or how to successfully integrate Wealth-Health to build their businesses. For further information about DSG's advisory services and tools to support front line employees and their clients go to [Click here](#)