



WHEN is having a **“Summer Special”** to make participation as affordable as possible for people who begin now.

Whether a product provider, product distributor, or investment advisor you need situational awareness to succeed.

WHEN ([Wealth-Health Executive Network](#)) provides that awareness to effectively plan and finance the cost of medical and healthcare. (20%+/- of GDP, more if you count unpaid care). It also provides situational awareness about concerns that top every client’s list: achieving and retaining the ability to finance and manage health and care across their family and over their lifetimes.

WHEN Members have direct access to a wide range of thought leaders and information from the medical, health, care, and financial services industries.

Our objective: Bring member firms insights and answers to the fundamental business question of, **“What products and services can I access or develop to meet clients’ critical needs with a unique value proposition?”**

WHEN members (and their entire firm) can access a robust library of thought leadership and discussions of relevant issues. 2022 programming has/will include:

Q-1. The Broader Impacts of Long Covid on Human Capital for Both Health Systems and Employers. Discussion leaders included:

P.J. Brennan, MD, Chief Medical Officer, University of Pennsylvania Health System,
Keith Kasper, CFO, University of Pennsylvania Health System, and
Iwan Barankay, PhD, Associate Professor of Business Economics and Public Policy, The Wharton School.

Q-2. Three Distinct Approaches to Healthcare Planning, and How They Complement Mainstream Financial Planning Software. Discussion leaders included:

Vanessa Ramirez and Allison Schierer, of Northwestern Medical,
Chris Heye, Founder of Whealthcare Planning LLC, and
Melinda Caughill, Co-Founder of i65.

Q-3 (8/23, 26, 31) [Moving Hospital and Care into the Home: Trends, Tools, and Technology to Manage In-Home Health.](#) Discussion leaders include:

Jeff Gruen MD, MBA, CEO and Founder of Raziel Health,
Jane Meier Hamilton MSN, RN, CEO and Founder of Partners on the Path, LLC,
and
Ashby Wolfe, MD, MPP, MPH, Regional Chief Medical Officer, CMS.

Q-4. Fiduciary Responsibilities and Infrastructures Related to Healthcare Planning and Funding. Discussion Leaders to be announced.

The Deal:

- 1. Participate in WHEN for the 2nd half of 2022 with full library access for 50% of the annual cost**
- 2. Join members to set the 2023 agenda**
- 3. Renew for 2023 for ½ the annual dues**

For more information about all WHEN resources and the network, please contact either of us:

Bob Grieb
rfgrieb@dsg-network.com
610-608-8247

Heywood Sloane
HeywoodS@dsg-network.com
610-457-2906