WHEN

Wealth-Health Executive Network

Meeting Topics – 4/2017 through 9/2022

Meeting agendas 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 discussion format facilitates an exchange of the broad range of perspectives that different industries bring to the shared challenges of senior health & care funding.

2022 – 3rd Quarter Session "Cluster" (via Zoom)

Advanced Technology to Support In-Home Health, *Jeff Gruen MD, MBA, CEO and Founder of Raziel Health.*

Meeting the Challenges of In-Home Care, *Jane Meier Hamilton MSN, RN, CEO and Founder of Partners on the Path, LLC,*

CMS Acute Hospital at Home Care Waiver, *Ashby Wolfe, MD, MPP, MPH, CMS Regional Chief Medical Officer,*

2022 – 2nd Quarter Session "Cluster" (via Zoom)

Long Covid – Health System Impacts Now and I the Future. *P.J. Brennan, MD, Chief Medical Officer, University of Pennsylvania Health System Keith Kasper, Chief Financial Officer, University of Pennsylvania Health System*

The Employer's Central Role in Health and Wellness in the Face of Rising Health Care Costs. *Iwan Barankay, PhD, Associate Professor of Business Economics and Public Policy, The Wharton School*

Long Covid – Human Capital Destruction at Scale, Implications for Financial Planning and Products. *Heywood Sloane and Robert Grieb, DSG*

2022 – 1st Quarter Session "Cluster" (via Zoom)

The Whealthcare platform, its behavioral approach, and objectives and advisor support
Chris Heye, Founder of Whealthcare Planning LLC,

PlanYourLifespan.org – Planning for hospitalizations, falls, memory loss, rehabilitation
Vanessa Ramirez and Allison Schierer, of Northwestern Medical,

Medicare Optimization and Introduction of i65 3.0
Melinda Caughill, Co-Founder of i65

Discussions: Whealthcare Assessment, T-3 Advisor Software Survey, Hurdles to Adoption
Heywood Sloane, Bob Grieb, The Diversified Services Group, Inc.

2021 Monthly Sessions (via Zoom)

Covid Implications for Funding of Senior Health Care – a Current Inventory
Heywood Sloane, Bob Grieb, The Diversified Services Group, Inc.

A Washington Perspective on Proposed Changes and Opportunities for Funding of Senior Health Care
James Capretta, Fellow, American Enterprise Institute

Financial Advisor Panel
When Health and Wealth Intersect: Strategies to Protect Wealth from the Impact of Health Care Costs
Amy Mathis, Lincoln Financial Group, Moderator
A Gary Katz, CBEC, Sagemark Consulting
Martin S Johnson, Sagemark Consulting
Elizabeth A. Liechty. ChFC, CLU, ADPA, Charter Financial Group

The Humanitarian Problems of Alzheimer's and How We Can Recognize and Manage Them
Jason Karlawish, Author, Professor Univ. of Pennsylvania, Co-director Penn Memory Center

Case Study: Allegacy Federal Credit Union – True Health and Wealth Integration
Steve Franke, Chief Financial Planning Officer
Brian Vannoy, Chief Credit and Risk Officer

Medicare Session #1 – CMS overview of history and status of Medicare
Patrick Hamilton, CMS

Medicare Session #2 – Medicare vs. Medicare Advantage
Sharon Graham, Regional Administrator, CMS
Patrick Hamilton, CMS
Courtenay Brummer, Milo

Medicare (Supplement) Marketing and Distribution
Edna Dretzka, Managing Director, Greenwald Research
Riaz Ali, CEO Saeidan and contributor to the Commonwealth Fund

Discussion: Fiduciary Responsibilities at the Intersection of Wealth and Health
Heywood Sloane, Bob Grieb, The Diversified Services Group, Inc.

The Complexities of Funding Care – A CCRC Prospective
Robert Super, CFO, Waverly Heights, Ltd.

Fall, 2020 (via Zoom)

Health Policy Update

James C Capretta, American Enterprise Institute, holds the Milton Friedman Chair at the AEI, where he studies Health Care, Health Policy and Health Economics in the context of US budgetary policy and global trends in aging, health, and retirement programs.

Senior Housing: Reacting to Covid-19
Tom Garvin, CEO, Waverly Heights Retirement Living Community, Gladwyne, PA
Amy Castleberry, Managing Director, Ziegler Investments

Impacts of Covid-19 on US Health Systems – the Good, the Bad, and the Ugly
Michael Buckley, MD, Infectious Disease Specialist; Retired CEO of Pennsylvania Hospital
Brian Duke, System Director of Senior Services, Main Line Health System; Former Secretary of PA Department of Aging
Mitchell Kaminski, MD, Thomas Jefferson University College of Population Health

Future of Health Benefits in the Workplace: Riding the Corona Rollercoaster
Paul Fronstin, Ph.D. Director, Health Research and Education Program, Employee Benefit Research institute (EBRI)

Consumers' Evolving Concerns and Reactions to Covid-19
Philip Gow, Co-Founder, Global Institutional Solutions

Regulatory Concerns and Responses to Covid-19
Marina Baranovsky, Scitus Consulting LLC, Risk Assessment and Regulatory Reform Services in the Securities Industry
Timothy McTaggart, General Counsel, Forethought Advisors and Partner McTaggart Law Firms and M&A Practice

Covid-19: Symptom and Catalyst at The Nexus of Wealth and Health…What it Means for Today and Tomorrow
Heywood Sloane, The Diversified Services Group, Inc.

Spring, 2020 (via Zoom)

The Pending Crisis in Senior Housing and Care
Beth Mace, Chief Economist for the National Investment Center for Senior Housing & Care (NIC).

Panel Discussion: Alternative Funding Options
Steve Irwin, President of the National Reverse Mortgage Lender Association
David Shapiro, Founder, Chairman and CEO of Equifi Corporation, PBC

Technology Innovation to Enhance Senior Lives and Health
Neil Gomes, Executive Vice President for Technology Innovation and Consumer Experience at Thomas Jefferson University and Jefferson Health System

The Economic (In)Security of Older Adults
Josh Hodges, Chief Customer Officer, National Council on Aging (NCOA)

Case Study: "If I Only Knew Then What I know Now…"
Becky Nilsen, founding member of SHEF and former head of Desert Schools Financial Services

SHEF Senior Housing Survey Discussion
Heywood Sloane, Principal, The Diversified Services Group, Inc.

October, 2019

Nursing and Care System Duress – Issues and Direction
Mary Tellis-Nayak, RN, MSN, MPH, Co-Winner of the American Health Care Association's "Champions of Quality" Lifetime Achievement Award

From Long Term Care Insurance to "Elder Care Financing" – Past, Present, and Where Do We Go from Here
Mike McRaith – Managing Director in Blackstone Insurance Solutions, former Director of the U.S. Department of the Treasury's Federal Insurance Office
Ann M. Frohman, Esq. – Frohman Law Office, former Director of Insurance, Nebraska Department of Insurance
Scott Harrison – Harrison Law and Alvarez & Marsal Insurance and Risk Advisory Services

Caregiving – A Worksite Perspective
Cynthia Hutchins, CRPC. CIMA, Director of Financial Gerontology, Bank of America Merrill Lynch

Advisor Engagement in Healthcare Funding
Marcy Keckler, CRPC, CFP, Vice President, Financial Advice Strategy, Ameriprise Financial

Helping Consumers Grasp and Deal with Healthcare Costs
Nancy Emerson, Vice President, Fidelity Health Solutions
Aditi Sharma, Director, Financial Solutions, Fidelity Investments

Survey: Responsibilities for Health Care and Funding – Past, Present, Future

April, 2019

The Changing Face of Patient Engagement
Joseph Devine, FACHE, New Jersey President and Chief Experience Officer for Jefferson Health

Understanding the Interconnectedness of Finances, Health, and Living Environments
Liddy Manson, Director, Aging Well Hub, Georgetown University McDonough School of Business

Medicaid Compliant Income Annuities
Michael Denton, President, Clarke Financial

“Whealthcare” – The Impact of Cognitive Changes on Financial Decision making
Jason Karlawish, MD, Professor of Medicine, Medical Ethics and Health Policy, and Neurology at the University of Pennsylvania

Using a Medicare Approved Medical Savings Account (MSA) to Fund Senior Healthcare
Jim Handlan, President, Lasso Healthcare

Top 10 Myths in Elder Law
Nancy Rice, Esq., CELA, Rice Elder Law

Survey: Advisor Understanding of Cognitive Changes, Living Options, Health Care and Funding, Elder law

October, 2018

Advocating For Critical Patients
Bonnie Friedman, Author, Hospital Warrior

Original Medicare vs Medicare Advantage – Differences and Direction
Joel Shalowitz, MD, MBA, FACP, Kellogg School of Business, Northwestern Univ. School of Medicine

Helping Consumers Make the Right Decisions Around Different Medicare Options
Craig Ritter, CEO, Ritter Insurance Marketing

How Home Health Care Providers Work
Stephen Huber, President, Home Care Providers, Orange Co., CA
Zac Overbey, CFO, Where the Heart Is, Memphis, TN

Senior Investor Regulatory and Compliance Issues
Marina Baranovsky, Principal, Scitus Consulting (former SEC Senior Risk Analyst)

Case Study: Integrating HSAs into Advisors’ Practices
Laura Grogan-O’Mara, Bank of America, Merrill Lynch

Successful Long Term Care Insurance Sales
Marlene Lund, Lund Insurance, Speaking of Aging
Andrew Levy, Lincoln Financial
Heather Olson, OneAmerica

Survey: “Pop Up Survey” series covering various topics including Cost Drivers, Understanding Government Programs, Understanding HSAs, Employer Efforts

April, 2018

Population Health – Its Impact on Healthcare Delivery and Costs

David B. Nash, MD, MBA, Dean of Thomas Jefferson University College of Population Health

Understanding the Range, Access and Benefits of HHS Programs
Dalton Paxman, HHS Regional Administrator
Sarah Shrimplin Yacoub, HHS Public Health Advisor

The Direction of Employment Based Health Benefits
Paul Fronstin, Ph.D., Director of Health Research & Education at the Employee Benefit Research Institute (EBRI)

Integrating Healthcare Funding on an Institutional Basis
Becky Nilsen, former CEO of Desert Schools Financial Services

Financial Advisor's Successful Approach to Helping Families Dealing with Dementia
Andy Hunt, Financial Advisor, Edward Jones

Planning for Senior Healthcare Funding – Two Personal Case Studies (one positive, one negative)
Amy Mathis, Financial Services Executive and primary Care Coordinator for her family

Survey: Senior Healthcare Planning and Funding

October 2017

Understanding and Managing the Financial and Emotional Impact of Alzheimer's
Beth Kallmyer, Vice President, Alzheimer's Association

Managing Post-Acute Care Expenses
Sanjoy Musunuri, Chairman and CEO, sinq Technologies

Aging at Home – The Direction of Services and Costs
Brian Duke, Director of Sr. Services, MLHS; former Secretary of PA Dept. of Aging
Sara Bradley, MD, Associate Professor of Medicine and Geriatrician, Northwestern Medical Center
Marlene Lund, Senior Healthcare Advocate
Annie Seltzer, Social Worker, Northwestern Medical Center Outpatient Geriatrics
Louise Starmann, LCSW, Managing Partner, Senior Life Consulting, LLC

Trends in Concierge Medicine
Bob Grieb, DSG

The Direction of Health Savings Accounts (HSAs)
Heywood Sloane, DSG for Danny Humphrey, VP HSA Wealth Services, HealthEquity

Changing Consumer and Advisor Perspectives Regarding Long Term Care
Bruce Moon, OneAmerica and Steve Schoonveld, Lincoln Financial

Future Innovations in Long Term Care Insurance

Rebecca Tipton and Matt Winegar, Thrivent Financial

Survey: Senior Healthcare Funding Segmentation

April, 2017

Washington Update
James Capretta, Fellow, American Enterprise Institute

The Future Direction of Healthcare
Ralph Muller, CEO, University of Pennsylvania Health System

Senior Healthcare Cost Drivers
Michael Buckley, MD, Retired CEO of Pennsylvania Hospital, Chief Medical Officer and Associate Dean for Physician Networks
Nisha Rughwani, MD, Geriatric Physician and Associate Professor, Icahn School of Medicine, Mt. Sinai Hospital, NY
Robert Kleman, VP Payor Strategies, Main Line Health System
Brian Duke, MBE, MBA, Dr. of Senior Services, Main Line Health System; former Secretary of Department of Aging, State of PA
Mindy Ferris, R.Ph., COO of Partners Pharmacy (the third largest long term care pharmacy in the US)

Survey: Perspectives on Healthcare Funding

The Wealth-Health Executive Network will help you "connect dots" across health, care, and financial products and services – to grow your business and to protect your clients' financial health.

For more information, contact:

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