



Wealth-Health Executive Network

The following organizations have participated in the Wealth-Health Executive Network (WHEN)

Financial Services

Allegacy FCU
Allied Solutions
Ameriprise
Associates of Clifton Park
Bank of America, Merrill Lynch
Blackstone Insurance Solutions
Cetera
Charter Financial Group
Clarke Financial
ConsejoSano
CUNA
CUSO Financial Services
Desert Financial CU
Edward Jones
Equifi Corporation, PBC
Fairwinds CU
Fidelity
Financial Health Network
First Citizens Bank
First Clearing
Genworth Global Institutional Solutions
Innovative Broker Partners
J.P. Morgan Asset Management
Lasso Healthcare
Lincoln Financial
LPL Financial Services
Mass Mutual
Morgan Stanley
MountainAmerica CU
National Reverse Mortgage Lender
Association
Nationwide
Navy Federal Financial Services
OneAmerica
OneAZ CU
Principal Financial

Private Wealth Alliance
Ritter Insurance Marketing
Sagemark Consulting
Santander
Thrivent Financial
Transamerica
Voya
Wescom Financial Services
Ziegler Investments

Medical Advisory

Delaware Valley Accountable Care Org.
Jefferson College of Population Health
Jefferson Univ. Health System
Lehigh Valley Health System
Main Line Health System
Northwestern University Health System
Pennsylvania Hospital
State of PA, Dept. of Aging
University of PA Health System
Speaking of Aging

Other speakers/participants

AARP
Abramson Center for Jewish Life
Active Day
The Aging Experience
Aging Well Hub, Georgetown Univ.
Alzheimer's Association
Amada Senior Care
American Enterprise Institute
Centers for Medicare & Medicaid
Services (CMS)
Delaware Valley Accountable Care Org.
Earp, Cohn, PC
Employee Benefits Research Institute (EBRI)
Forethought Advisors

Friends Life Care
Gloucester Township, NJ
Greenwald Research
Home Care Providers
i65
Hospital Warrior
Kellogg School of Business
Messick & Lauer, PC
Mt. Sinai Health System
National Council on Aging (NCOA)
National Investment Center for Senior
Housing and Care (NIC)
Partners on the Path

Partners Pharmacy (Cardinal Health)
PlanYourLifespan.org
Raziel Health
Scitus Consulting
Rice Elder Law
Senior Life Consulting, LLC
sinq Technologies
The Wharton School
University of PA Health System US
University of PA Healthy Brain Center
Dept. of HHS
Waverly Heights, CCRC
Wealthcare Planning
Where the Heart Is, Inc.

WHEN is a service of The Diversified Services Group, Inc.

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