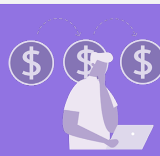
HealthView SERVICES

Solutions Across Financial Services

Our Proven Approach

Our patented actuarial data empowers firms to deliver comprehensive planning that addresses a wide range of financial planning challenges. Personalized projections link directly to investment solutions, so clients can take immediate action by investing today.



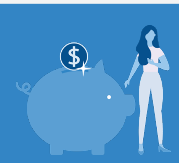
Serving Fund Companies

Unique tools and data delivered to wholesalers, marketing departments, advisors, and RIAs.

Wholesalers can help advisors position their funds to address client healthcare and LTC planning goals, leading to increased AUM.

Marketing Departments can enhance their offering with healthcare, long-term care, and Social Security focused tools, content, and expertise.

Advisors & RIAs can implement investment strategies to meet client goals, address personalized healthcare and Social Security planning gaps, and fund future long-term care expenses, all through proven practices that increase AUM.



Areas of Focus

Out-of-the-box or custom apps positioning investment solutions to offset gaps in areas of leading client concern

Healthcare & Long-Term Care Costs:
Investment solutions aren't just about growing wealth; they can help cover future medical expenses and end-of-life care needs, providing a safety net for retirement. This dual benefit is a powerful tool in one's financial planning arsenal.

Social Security Optimization:
While Social Security is an income-based model, building a portfolio that lowers a clients' modified adjusted gross income (MAGI) decreases their means-tested Medicare surcharges, which ultimate increases high-net-worth clients' Social Security checks.

HealthView Services proudly contracts with firms across the financial services industry. Our mission is to create a toolset perfectly customized to the client, and that process begins with understanding your mission.
So what's yours?

Scan the QR code to set up a meeting.

SCAN ME

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