



Retail Products for Financial Professionals

Actuary-backed applications from
HealthView Services & Milliman

Morningstar Investment Conference 2024

**Arm advisors with
the tools they
want, and their
clients need.**



About Milliman

Milliman combines decades of experience with cutting-edge technology to help insurers, healthcare organizations, employers, and other stakeholders thrive, innovate, and grow in the face of the world's toughest challenges.

For seven decades, Milliman has led the way in actuarial and consulting services, equipping clients with practical intelligence, innovative tools, and effective strategies across sectors.

About HealthView Services

Founded in 2006, HealthView Services was created to fill a void in the financial services industry with retirement healthcare planning and related advisor solutions.

We work with Asset Managers to provide advisor-facing applications that can be run as standalone experiences, as part of larger planning solutions, or through micro-sites. HealthView aims to help Americans better prepare for retirement with easy, unique, and actionable software.

Enhance Your Advisor Resource Offering With:



Custom-Built Tools

Unique user experiences that leverage actuarial data and link to fund-focused solutions.



SaaS Planning Applications Proven out-of-the-box retail platforms that help clients address top retirement concerns by utilizing your funds.



Integration with Advisor Microsites

Embed proven consumer-facing healthcare, long-term care and Social Security solutions into advisor webpages.

Complement your advisor support platform with proven HealthView solutions (all backed by Milliman data) that position your funds to address leading retirement planning concerns.



How HealthView Services and Milliman Serve Asset Managers

For more than a decade, HealthView Services and Milliman have collaborated to create simple and actionable advisor-facing financial planning applications backed by personalized, actuarial data. Our unique approach to preparing clients for critical retirement planning challenges has led to more investments, increases in AUM, and better retirement preparedness.

HealthView's product team works with firms across financial services to design, develop, and implement customized solutions that meet their unique needs. Asset Managers seeking to enhance their advisor offerings can add to their resource library with applications that identify, individualize, and address leading client concerns with your funds as the solution. Standalone tools and integrations into existing applications are available.

The key is leveraging retirement healthcare costs in this experience, and with the backing of Milliman, our tools ensure that only the most accurate data is being utilized.

Milliman creates intelligent technology powered by advanced modeling, modern architecture, and unparalleled data. Their experienced subject-matter experts build and support these solutions, prioritizing integration with existing technologies and processes and customization to meet real-world challenges.

RESULTS ACROSS FINANCIAL SERVICES

With HealthView-backed solutions, clients report...

- ✓ Average advisor ticket size increase of **24%**
- ✓ **20%** increase in 401(k) contributions





CERTIFICATIONS & INFRASTRUCTURE

- ✓ Actuarial Health Cost Projection Methodology - Two Patents
- ✓ NSSA Social Security Certified Planners
- ✓ Medicare & LTC Knowledge Experts
- ✓ HIPAA-Compliant Servers
- ✓ Encrypted Databases
- ✓ Dedicated Support Services

CONTACT US!

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