



link·age™

connecting resources *for the aging*

The Longevity Economy
*At the Tipping Point of
Unprecedented Opportunity*

What should I hope to get out of this presentation???

- A high level overview of the “Longevity Economy” and why it’s worth paying attention to (Hint: There are more than \$7 Trillion really good reasons...)
- Get a better understanding of how some of your peers are looking to leverage their domain expertise, access to older adults, and deploy capital
- Get a glimpse at some innovation that works as a stand-alone solution or a bundled package to help older adults thrive as they age
- Ideas to turn insight into action



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Link-age is a member-owned organization focused solely on helping companies succeed in the aging population marketplace. We are made up of 600 senior living communities in 39 states reaching over hundreds of thousands of aging adults, providing our members and customers unparalleled purchasing power and research access.

Invests in companies providing products, services or technology to the aging demographic market.

**Link•age
Ventures**

Provides cost savings, best practice counsel and networking opportunities to companies serving the aging population

**Link•age
Solutions**

**Link•age
Connect**

Conducts and analyzes research on the aging population and provides subject matter expertise to help companies capitalize on the rapid demographic shift

So, why should we pay attention to the aging population?

- The 65+ market is the fastest growing demographic and by 2030, will comprise 20% of the US population (of this group 85+ is the fastest growing on a percentage basis)
- The older consumer dominates 119 of 123 consumer packaged goods categories*
- People over the age of 50 account for \$4.6 trillion in annual spend*
- There are now more people over the age of 65 than under the age of 15 for the first time in our country's history and it is likely to be that way for the foreseeable future
- 47% of Americans over the age of 75 take more than 5 prescriptions per day
- 29% between 65-69 are still working full time



We need to evolve our perspective from Aging-in-Place to Thriving-in-Place

•**The unintended impact of Innovation** – a variety of factors are contributing to most older adults aging at home. Utilization of technology helps us stay more connected than ever but can also contribute to an increase in social isolation and an increasingly sedentary lifestyle. A very recent Link-age Connect study about the technology use of older adults revealed:

- Still general unwillingness among the older Americans to pay for technology & don't want a loved one to buy it for them
- High percentage of people over 75 use tech to manage finances & retail accounts
- Almost 90% use the internet for their news, information, and entertainment
- Almost 80% view or send pictures to family via technology and nearly 96% use email
- Most want to learn about tech 1-on-1, through classes/workshops, online while 5 years ago the family physician was the #1 choice of how to learn about new tech innovation



Given the importance of the aging demographic what type of engagement are we seeing?

- **Major tech categories for older adults: Communication & Engagement, Home Safety & Security, Health & Wellness, Learning & Contribution**
- Global electronics companies are starting to explore the aging space through the development of new products ranging from “**wearables**” and **mobile technologies** to **sensor based solutions** that will help promote better health, socialization, and independence.
- Some major US Corporations like **United Healthcare** (Insurance), **GE**, and **Kroger** are looking at new ways to support and engage their older employees as well as those employees who are caring for older adults. **Cost of care giver duties** by US employees “costs” US businesses approximately **\$35,000,000,000** per year.
- Financial Institutions and tech start-ups are seeking ways to capture the older banking customer through new types of secure online (**True Link Financial**) and tailored in-person (**First Republic Bank**) banking experiences.

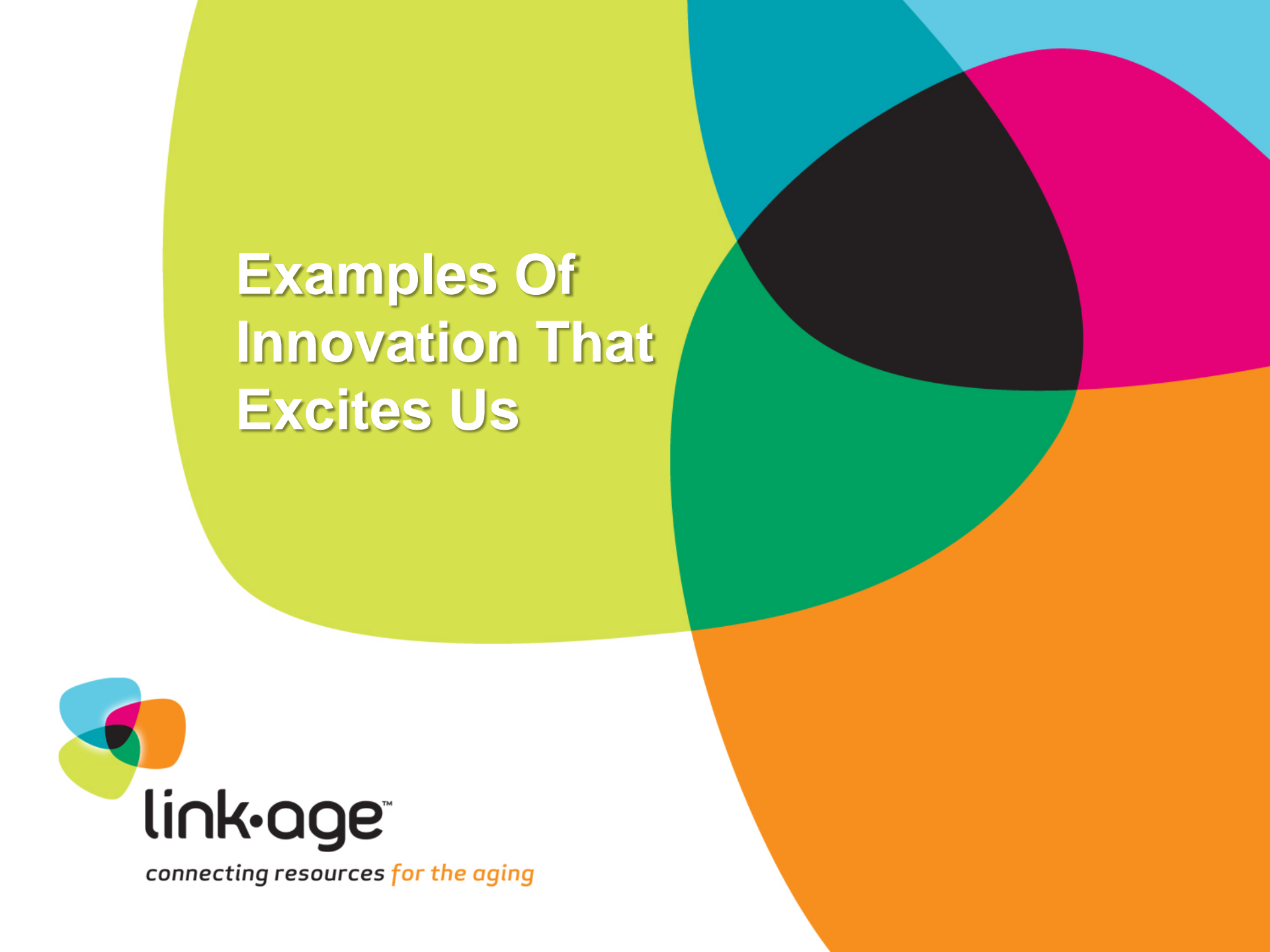
ZIEGLER LINK-AGE LONGEVITY FUND

A PRIVATE EQUITY FUND FOCUSED ON SELECTED SEGMENTS OF THE LONGEVITY ECONOMY

The Ziegler Link-Age Longevity Fund, LP is a \$27 million private equity fund, with an investment policy of making equity investments in early to mid-stage companies with emerging growth characteristics in healthcare information technology and services associated with the Longevity Economy.

INVESTMENT CRITERIA

Industry Preferences Strategy	<ul style="list-style-type: none">• Healthcare IT, Healthcare services and other companies serving the longevity economy• Early to mid-stage• Equity and equity-like investments• Emerging growth companies
Targeted Investment Size	<ul style="list-style-type: none">• \$250,000 to \$5,000,000
Investment Criteria	<ul style="list-style-type: none">• Operating in or developing businesses focused on the longevity economy• Experienced management teams• Business models demonstrating scale• Attractive marketing and sales capabilities• Legally-protected and proprietary intellectual property where applicable• Favorable risk/reward investment profile with identified and realistic exit strategies



Examples Of Innovation That Excites Us



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Caremerge is a coordination network that keeps care teams, families, and patients informed and cohesive through a HIPAA compliant, easy-to-use mobile and web-optimized interface. With **Caremerge**, everyone has access to the right information when they need it most to improve overall wellness and satisfaction for all.



Caremerge solutions are currently used in over 200 locations across 35 states and the company enjoys a 99% client retention rate.

Markets Served



Life Plan Community



Assisted Living/Memory Care



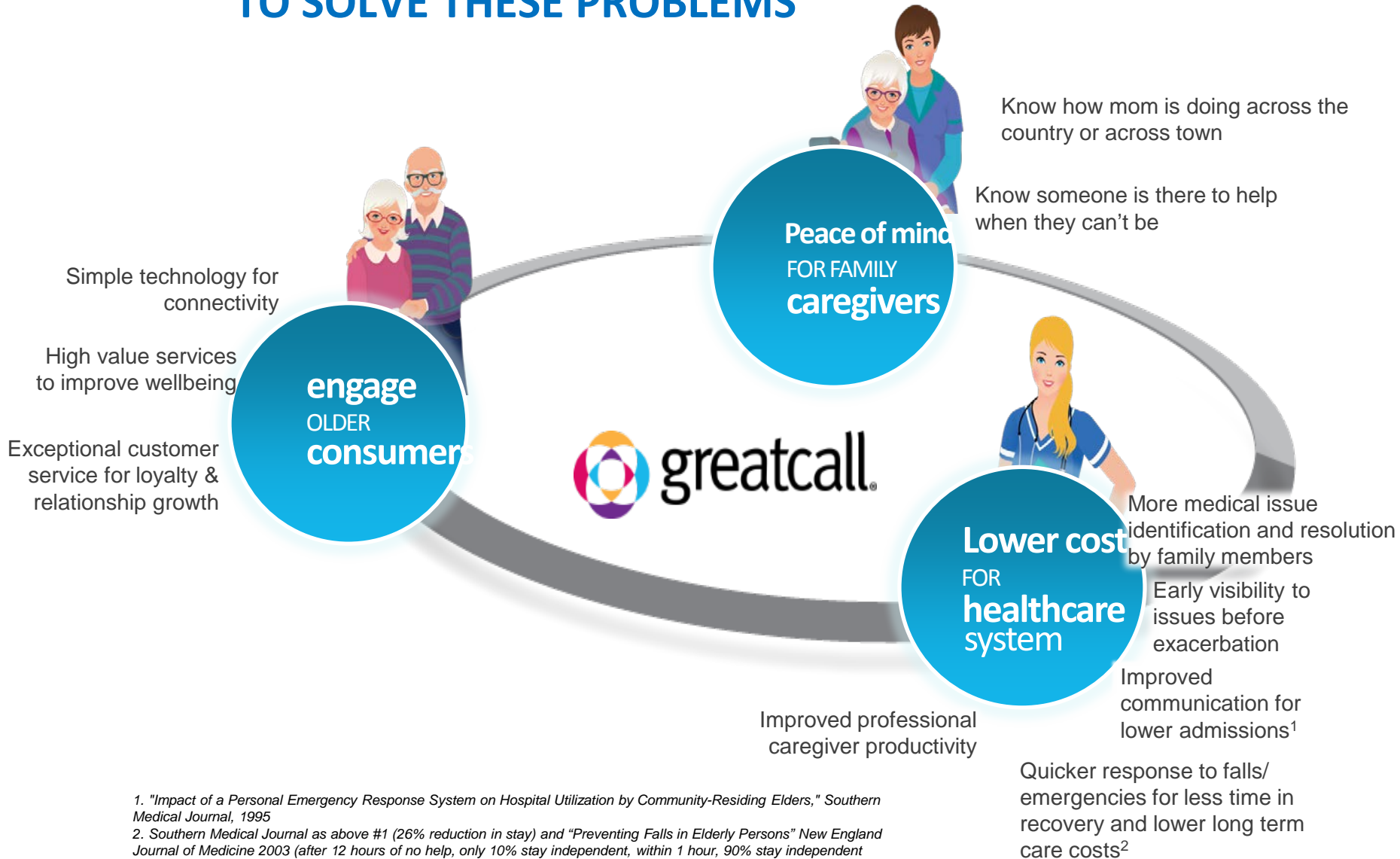
Skilled Nursing



Bundled Payments

Increase revenues, reduce costs, improve experience for everyone involved

GREATCALL FOCUSES ON SIMPLE COST EFFECTIVE TECHNOLOGY AND GREAT SERVICE TO SOLVE THESE PROBLEMS



HOW WE DO IT: TANIGBLE BENEFITS THE SENIOR

We drive engagement using tangible technology...



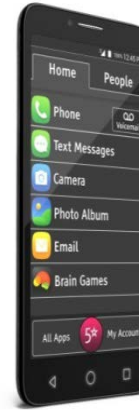
lively
alert™



lively
wearable™



jitterbug
flip



jitterbug
smart



lively
home™

...And achieve results through engaging services that improve wellbeing

5star Urgent Response	Med Adherence	Telehealth	Fall Detection	Geo & Activity tracking	Transportation
Telecom service	Brain Games	Caregiver app	Check-ins	Fall Prediction	Vitals monitoring & Predictive Risks

 = Coming in F2017

...in 10 years they have grown from startup to \$250m in revenues and over 1,000 dedicated employees

True Link supports older adults and their families

WHAT IS THE COST of ELDER FINANCIAL ABUSE?

\$36.5 BILLION

EXPLOITATION

When businesses, individuals, or charities use pressure tactics or misleading language to lead seniors into financial mistakes.



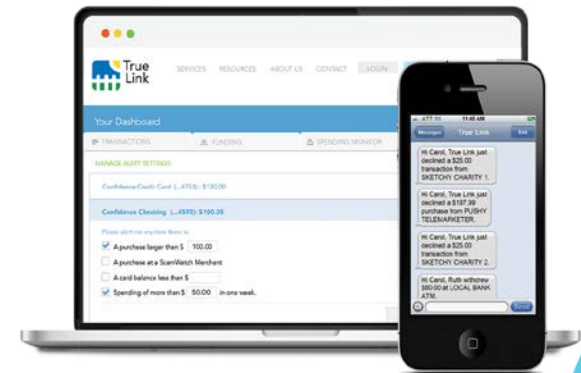
FRAUD

When criminals commit identity theft or con seniors into sending money or sharing personal information.



TRUST ABUSE

When family, friends, or paid helpers take advantage of a trusting relationship to get money from the senior.



True Link increases the financial well-being and independence of seniors, adults with disabilities, and vulnerable individuals. We provide financial tools that can be self-managed or administered by family members, advocates, or professionals.

True Link works with seniors and their families to protect against elder financial abuse. By stopping problems before they start, our services enable seniors to live more independent, dignified lives, while family members enjoy greater peace of mind.



THE TRUE LINK CARD

A customizable debit card that promotes safe spending & independence



TRUST MANAGEMENT

An end-to-end system that includes investment management, reporting, compliance, and more



CAREGIVER CARD

A customizable debit card used to manage and monitor caregiver spending

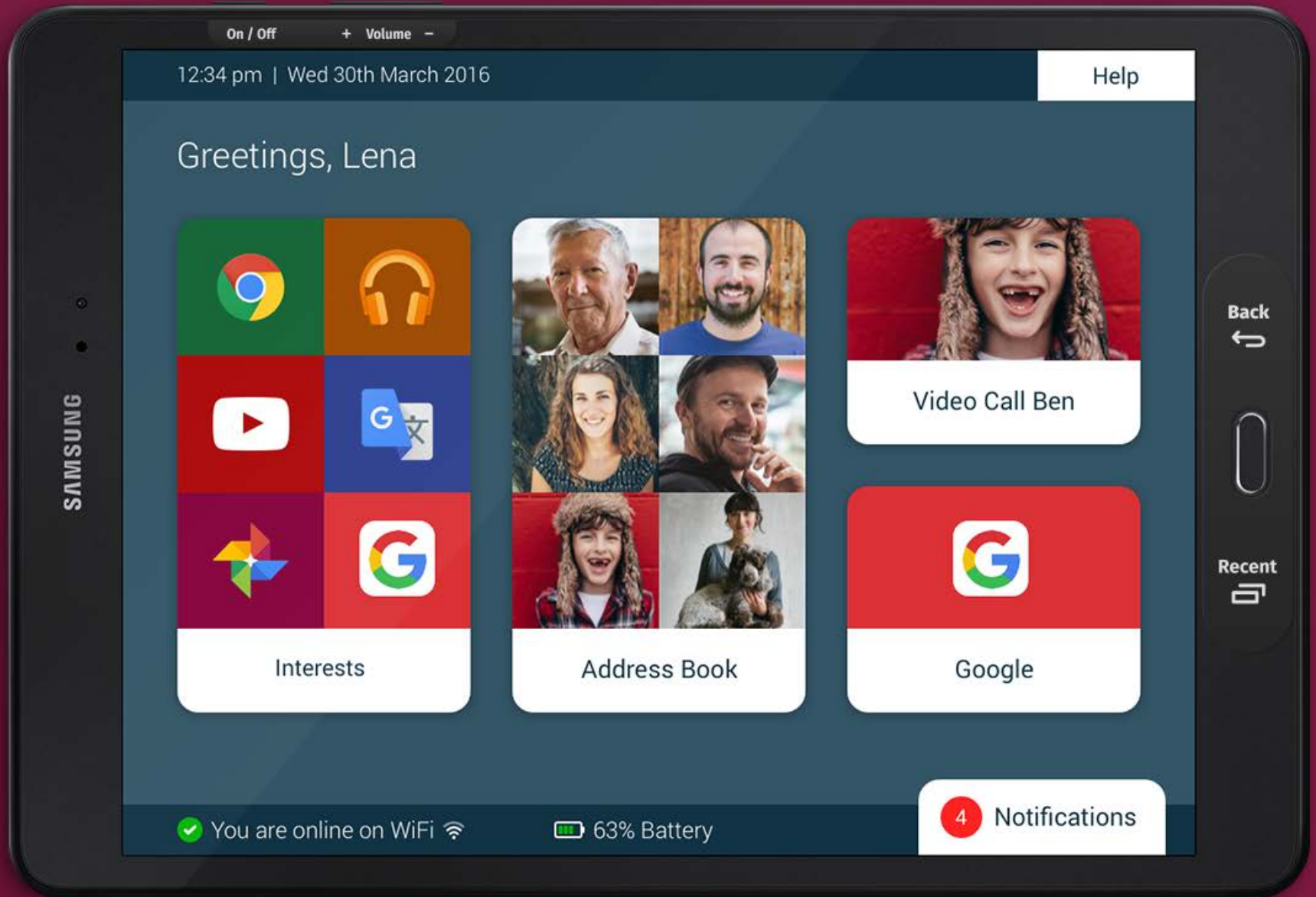


TRUST RESOURCES

Information on relevant trusts and a network of vetted legal experts to provide support

We have you covered from everyday spending to complex trust management

Breezie



Breezie is a touch screen tablet based system that is proven to engage seniors with technology, irrespective of their technical capabilities.

Senior living providers use Breezie to reduce costs and improving care:

- Reduce isolation and loneliness amongst residents
- Offer life enrichment and support for activities of daily living
- Increase mental engagement through tailored programs
- Prolong the transition from Home > IL > AL > SNF

Breezie is unique and scalable:

- Runs on off-the-shelf tablets and utilizes existing applications.
- Highly personalized for each person based on abilities and motivation
- Platform with multi-tier support and comprehensive management tools

More than 3,500 seniors between the age range of 63-104 years old use Breezie for 62 minutes every day.

Breezie

Breezie is getting great feedback from ZLLF LPs such as Ohio Masonic, Maple Knoll, Western Homes and with national organizations such as National Council on Aging and American Cancer Society.

Breezie has signed strategic agreements with Samsung and CDW:

- Cuts down implementation time and effort for customers by 80%
- Offers customers all inclusive pricing/leasing options < \$30/month/user

4 year old UK company, recently expanded to the US:

- Headquartered in Pittsburgh for innovative partnerships with CMU & UPMC
- Available for purchase through CDW as a complete package including Samsung tablet, accessories, Breezie subscription and ongoing support
- Integrating Caremerge (care coordination), Smart Things (smart apartments), Sing fit (music therapy) and other relevant senior care solutions.

Get in touch – Jeh Kazimi, Founder & CEO – jeh@breezie.com

Breezie

NETFLIX



Music therapy

ReSound



Care Coordination

amazon



e-Commerce monitoring
and protection



Your
Health

Health-related
Content

**Breezie's API
integration & intelligent layer**



- Globally, 50 Million people have dementia. 1/3 of the US Population over the age of 85 has Alzheimer's and that number is expected to double in the next 20 years.
- The cost of caring for someone with dementia is 15X that of a normally aging adult or roughly \$1,000,000,000,000 annually.
- Assurex Health is a personalized medicine company based in Mason, OH that specializes in pharmacogenomics. Their proprietary technology is based on the study of the genetic factors that influence an individual's response to drug treatments—as well as evidence-based medicine and clinical pharmacology.
- The GeneSight test was developed in the Assurex Health clinical laboratory and is based on patented technology licensed from two world renowned medical centers, Mayo Clinic and Cincinnati Children's Hospital Medical Center, who continue to be research collaborators.

Solutions



GeneSight Psychotropic

For people who have been diagnosed with depression, PTSD, anxiety or other conditions



GeneSight Analgesic

For people who have been diagnosed with acute or chronic pain



GeneSight ADHD

For people who have been diagnosed with ADHD



CARELINX VALUE PROPOSITION

Improving the accessibility of quality in-home care

CareLinx has built the **largest nationwide caregiver marketplace**, eliminating the need for agencies

CareLinx matches clients with caregivers based on their specific needs and budget

140,000+ caregivers, operating in over 3,000 cities

Caregivers are **vetted, insured & bonded with \$4M in coverage**

Affordable
Options

Easy Interface

Trusted

Shared Data

Empowering every individual to age gracefully at home

link·age[™]

ESTABLISHED & GROWING STRATEGIC CHANNELS

CareLinx enables partners to lower costs, improve outcomes and manage shared risks

Independent Living
Assisted Living

Assisting residents in hiring
affordable and vetted
caregivers

Digital Care Plan:
Allows families to engage

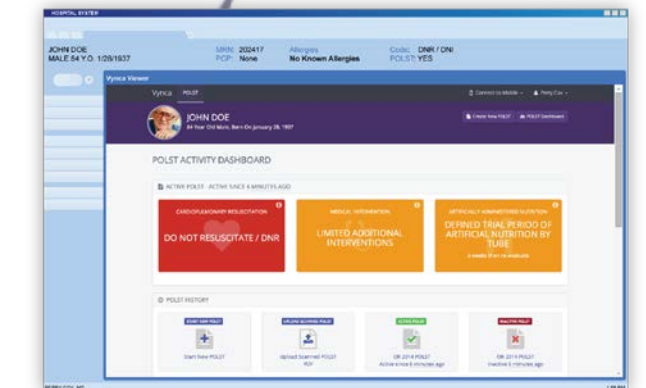
Co-branded Platform:
Extension of services to in
non-medical home care

Hospitals
ACO's
Skilled Nursing

Co-branded Platform:
Extension of medical services
into non-medical business

Digital Care Plan:
Data shared with system to
avoid re-admission into ER

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At the tipping point – now what???

- **Shift thinking from “aging in place” to “thriving in place”. Leverage your expertise and thought leadership to intercept the consumer where they want to buy.**
- **Collaboration 2.0 - Go WAY beyond your comfort zone to find new collaboration partners (Disney, FedEx, Nordstrom, Ritz-Carlton, Kroger, Amazon, Southwest Airlines, Academia, Apple, Yahoo, etc.).**
- **Look for ways to apply your expertise and thought leadership in the areas of Health care trends, the aging workforce, multi-generational housing and the caregiver**
- **There has never been a better time to be an innovative provider than right now. Upheaval in the market is creating greater opportunity for differentiation. We will ALL need to help society reframe its concept of what aging really means.**
- **The market for innovative solutions in the “Longevity” space is wide open to those who are willing to think differently.. Run from “sameness” and exhaust yourself to find new sources of inspiration!**

Question Everything...Disruptively Innovate

***We must lead an aging revolution because what got us where we are today
won't get us where we need to go!***