

ZIEGLER LINK•AGE FUND FAMILY

ACTIVE PORTFOLIO COMPANY PROFILES

AUGUST 2024

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ACTIVE PORTFOLIO COMPANY PROFILES

Aaniië



COMPANY OVERVIEW

Aaniië is an intelligent, cloud-based platform for managing home care and a-la-carte services in communities. The platform supports any service offering, ranging from basic household help to pet care to home care, personal care, HCBS, and ADL support. With sophisticated automation, connected technologies, and advanced proactive analytics, Aaniië simplifies scheduling and marketing services, helps track service delivery, automates back-office functions, and drives higher profitability for service lines.

Features include a resident/family portal, CRM, smart scheduling, care delivery app, adult day program dashboard, complete hiring platform, caregiver retention toolset, marketing automation, EVV, custom forms, predictive analytics, automated invoicing/payroll, reporting insights, and integration with senior living platforms like PointClickCare.

Aaniië's intuitive, highly scalable solution makes it ideal for any community that offers services to its residents or the surrounding area.

Aaniië helps communities:

- **Increase resident satisfaction** by offering easy access to a-la-carte services like basic need care, pet care, and more.
- **Reduce costs** by offering ADL and support services to keep residents in the community longer.
- **Market services to residents** through an on-demand portal.
- **Build relationships** in surrounding areas with home- and community-based services.
- **Improve profitability and efficiency** of service lines with back-office automation and smart scheduling.
- **Manage enrollment and attendance** in programs like adult day or social clubs.
- **Improve employee satisfaction** with efficient workflows and gamified rewards.

With Aaniië, organizations can achieve optimal operational levels using transformative technologies like AI, automation, and advanced interoperability. Best practice workflows and innovative digital solutions ensure service providers can meet the evolving needs of a changing world, especially the rapidly aging population.

The platform is highly configurable through extensive system settings to create a solution that meets the individual needs of each community's business operations, location, and resident/payor mix.

Aaniië has adult communities and home care agencies actively using the platform across the United States.

HEADQUARTERS

Eau Claire, Wisconsin

KEY CONTACT

Scott Zielski
Chairman and Chief Executive Officer

ESTABLISHED

2017

COMPANY WEBSITE

aaniië.com

INITIAL ZLF INVESTMENT DATE

April 2022

ZIEGLER LINK•AGE MANAGEMENT

790 N. Water Street, Suite 2275
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Access TeleCare



COMPANY OVERVIEW

Access TeleCare was founded by a group of physicians with a radical vision: that high-quality specialty care could be delivered at scale through technology to eliminate barriers to care. Our mission ever since has been to provide timely access to high-quality specialty care – inpatient and outpatient – to improve patient outcomes in a measurable way.

Today, Access TeleCare is the nation's leading provider of acute specialty telemedicine. Our clients include 17 of the 25 largest health systems in the nation as well as small rural and community hospitals across the country. We serve customers in all 50 states with our team of 700+ providers currently operating over 2,200 programs nationally. We collaborate with care teams to deliver high-quality acute and behavioral health care at scale. We provide timely access to diagnosis and treatment in order to improve patient outcomes as well as the financial stability of our clients. Together, we're making a difference in health care through innovation and high-quality, patient-centered care programs.

Our telemedicine services include behavioral health, neurology, hospitalist medicine, pulmonary and critical care, maternal-fetal medicine, infectious disease, cardiology, and nephrology. Access TeleCare was the first provider of acute clinical telemedicine services to earn The Joint Commission's Gold Seal of Approval and has maintained that accreditation every year since its inception. Learn more at [AccessTeleCare.com](https://www.AccessTeleCare.com).

HEADQUARTERS

Dallas, Texas

KEY CONTACT

Chris Lukasiak
Chief Growth Officer

ESTABLISHED

2004

COMPANY WEBSITE

[accesstelecare.com](https://www.accesstelecare.com)

INITIAL ZLF INVESTMENT DATE

December 2018

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Alix



COMPANY OVERVIEW

Alix is the first and only comprehensive service that handles every step in the estate settlement process for families. Through a combination of human expertise and cutting edge technology, Alix does the hard work of closing out the digital, personal and financial affairs after someone has passed, giving families back hundreds of hours of time and providing peace of mind that their loved one's wishes were honored.

Their team of lawyers, CPAs, fiduciaries and experienced specialists ensure that every step in the process, from discovery to final distributions, is completed correctly and efficiently, helping families avoid stressful and expensive settlement missteps.

An easy to use app allows families to stay informed as Alix does the work to settle the estate. Individual logins and customizable access is provided to help executors maximize transparency and keep families up to date throughout the process. Families will also have access to an assigned Care Team Specialist that is available to answer questions, provide guidance and work with them until the settlement process is complete.

Some of the most important tasks and responsibilities Alix takes on include:

Discovery: Alix will search for any assets and debts that are associated with the estate, ensuring that no stone is left unturned and families receive all funds and assets in their loved one's name.

Securing of assets: Alix will create an inventory of all assets and liabilities and help ensure that all assets are secured including retirement and investment accounts, bank accounts, insurance policies and more.

Fraud protection: Alix will notify appropriate government and credit agencies of the passing and ensure that fraud protection measures are put in place to protect assets and the decedent's identity.

Closing down accounts: Alix will close down all accounts of the decedent including bank accounts, subscription services, memberships, digital profiles and more.

Probate management: If probate is required for the estate, Alix will provide guidance through the process and support with court filings, public notices, government agency notification, court hearing preparation and assets and debts inventory submissions.

Debt negotiation & resolution: If there are debts associated with the estate, Alix can work with creditors and institutions to reduce and resolve these debts on behalf of the family.

Distributions: Alix will facilitate distributions of inheritance to beneficiaries.

Property sales & transfers: Alix will help arrange the sale of physical property including homes, antiques, collectibles and more. Alix will also facilitate the transfer of property such as vehicles and boats.

Taxes: Alix will file income tax returns for the decedent's last tax year, as well as final estate taxes.

HEADQUARTERS

Los Gatos, California

KEY CONTACT

Alexandra Mysoor
Founder/CEO

ESTABLISHED

2023

COMPANY WEBSITE

meetalex.com

INITIAL ZLF INVESTMENT DATE

July 2024

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ACTIVE PORTFOLIO COMPANY PROFILES

Arena Analytics



COMPANY OVERVIEW

Our goal is to rewire the labor market by applying predictive analytics and AI to transform the way organizations work. Our platform optimizes your team for efficiency in applicant screening, predicting retention and mitigating bias — delivering productivity gains and insights to create the highest performing teams. Guaranteed.

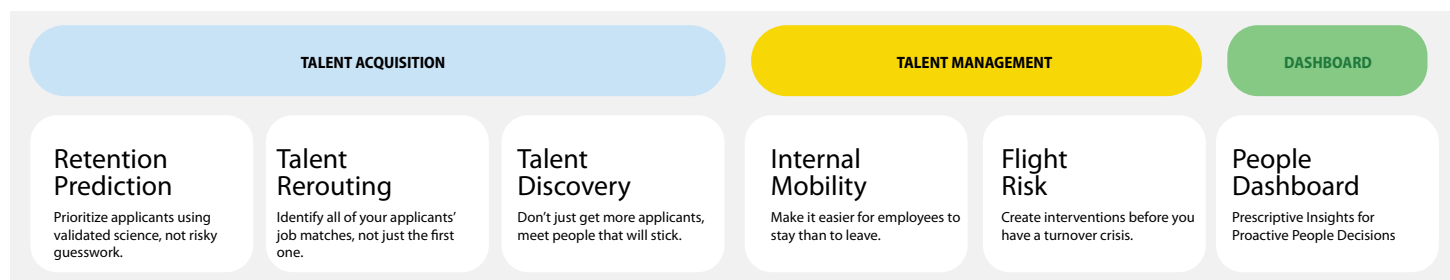
Since our founding in 2015, Arena has been leveraging advanced AI and predictive analytics to empower organizations with the talent intelligence needed to make proactive, data-driven workforce decisions.

Arena brings talent acquisition, talent management, and talent analytics solutions into one unified platform. Maximize your ROI by creating a holistic strategy across internal and external talent, with tangible results:

- boosting staff retention
- optimizing labor costs
- reducing time to hire
- improving resident care

Arena is deployed across acute and post-acute care facilities in the U.S. Representing 18% of the healthcare workforce, including 6.2% of all U.S. RNs and 49% of all CNA's in the U.S. on our platform, Arena has the dataset to provide predictive analytics, so you can be proactive in your business decisions. A stable workforce delivers better resident experiences, improves patient care and health outcomes, and drives business success. We guarantee results because we know our solutions work.

Arena drives a 21% average turnover reduction in year 1 with offerings that include:



HEADQUARTERS

Baltimore, Maryland

KEY CONTACTS

Mike Rosenbaum
Founder and Chief Executive Officer

Kelly Russell
Chief Commercial Officer

ESTABLISHED

2015

COMPANY WEBSITE

arena.io

INITIAL ZLF INVESTMENT DATE

February 2019

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At Home Harmony



COMPANY OVERVIEW

Overseen by physicians, our team of nurse practitioners, physician assistants, and other advanced practice providers bring primary care and pharmacy services into homes and senior living communities. We serve aging adults with complex needs and chronic conditions.

At Home Harmony has been approved to participate in Medicare's new GUIDE program and will be delivering added services to its existing care model to reduce caregiver strain and improve quality of life for patients living with dementia.

Visit www.athomeharmony.com to learn more.

HEADQUARTERS

Richmond, Virginia

KEY CONTACT

Will Saunders

Chief Executive Officer

Alyssa Hall

Vice President, Sales & Marketing

ESTABLISHED

2021

COMPANY WEBSITE

athomeharmony.com

INITIAL ZLF INVESTMENT DATE

April 2023

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ACTIVE PORTFOLIO COMPANY PROFILES

BlueStar Telehealth



COMPANY OVERVIEW

BlueStar provides telehealth services to help clinical caregivers connect with their remote patients. We provide a full suite of technical and logistic services, including video, software, hardware, communications, nurse monitoring, billing support, and other ancillary services.

- In business since 2013, serving thousands of families across all 50 states
- Service-Disabled-Veteran-Owned small business, certified by the Veterans Administration
- CEO is a retired two-star admiral
- 15 generals and admirals from the Army, Navy, Air Force, Marine Corps, and Coast Guard on our advisory board, including doctors and nurses
- Shareholders include over 40 admirals and generals from all services
- Winner of the SBA Small Business of the Year Award in Maryland
- A+ Rating from the Better Business Bureau; 500+ positive reviews on the web
- Established a non-profit 501(c)(3) to provide services to needy senior veterans

BlueStar does all the work to enable health care providers to quickly launch and manage a Remote Patient Monitoring (RPM) program, including:

- Full service suite — the practice enrolls patients, and BlueStar does the rest
- Initial installation of equipment
- Purchase, inventory, programming, kitting, and shipping of equipment to the patient
- Activation of equipment and training the patient on its use
- Maintaining the hardware and software to deliver data
- Operating the software to deliver data to family, our nurses, and clinical staff
- Customer service and technical support
- Provision of all hardware and peripherals, including those lost or damaged
- Return, refurbishment, and re-issuance of equipment as patients move in and out
- 20 minutes of monitoring and patient interaction by a QHP
- A proprietary and continuous method of engaging with the patient to ensure compliance
- Daily review of data by our nursing team
- Provision of automated alerts, as well as e-mails or phone calls

In addition to the basic RPM services listed above, BlueStar provides other related services:

- Chronic Condition Management (CCM)
- Patient recruitment and enrollment services
- Emergency Department (ED) avoidance programs to reduce excessive ED use
- Mission-driven — focused on patient care and the success of your telehealth program

HEADQUARTERS

Rockville, Maryland

KEY CONTACT

Robert O. Wray, Jr.
Chief Executive Officer

ESTABLISHED

2013

COMPANY WEBSITE

bluestartelehealth.com

INITIAL ZLF INVESTMENT DATE

May 2020

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Bluestone Physician Services



COMPANY OVERVIEW

Bluestone Physician Services' value-based, on-site model of care goes beyond primary care services. Bluestone provider teams are dedicated to serving the needs of patients with chronic conditions, including dementia, residing in assisted living and memory care communities across Minnesota, Wisconsin, and Florida. Bluestone recognizes that patients need a customized approach to care that is preventative and proactive and includes all care team members. Medical providers, nurses, social workers and behavioral health managers collaborate with facility staff and patient families to ensure the best possible care for patients at home.

Bluestone's integrated care model addresses the patient's physical, behavioral, and emotional health and is designed to serve the most fragile patient population. Bluestone delivers superior clinical results from this team-based approach focused on proactive, preventative care.

Primary Care – Bluestone's physicians, nurse practitioners, and physician assistants specialize in the unique needs of patients with chronic conditions and disabilities. They provide primary care services on-site or via telehealth, eliminating the need for staff or family to transport residents and keeping patients comfortable in their homes.

Care Coordination – Bluestone Care Coordinators (RN or LSW) assess a person's physical, mental and social determinants of health. Care Coordinators facilitate services and communication across the care team while keeping the patient's best interests in mind.

Behavioral Health Services – Bluestone provides a dual approach to managing psychiatric diagnoses and behaviors. Licensed psychiatry providers are involved through medication management, monitoring behaviors and collaboration with Bluestone Providers and Care Managers. Behavioral Health Care managers, available to patients on Medicare, offer non-pharmacological strategies and interventions for behaviors.

HEADQUARTERS

Stillwater, Minnesota

KEY CONTACT

Rajiv Patel, MD, MBA, FACP
Chief Executive Officer

ESTABLISHED

2006

COMPANY WEBSITE

bluestonemd.com

INITIAL ZLF INVESTMENT DATE

September 2021

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Cosán



COMPANY OVERVIEW

Cosán provides care management services to adults with chronic conditions in collaboration with their primary care or specialty providers, filling the gaps between provider visits. Through Cosán's Chronic Care Management (CCM), Behavioral Health Integration (BHI), Remote Patient Monitoring (RPM) and Principal Care Management (PCM) programs, the company works in concert with physicians and other healthcare organizations around a central, individualized care plan. This results in positive clinical outcomes for patients and increased revenue for practices, delivered via a unique blend of technology and human-first services. Cosán empowers healthcare organizations who participate in alternative payment models with a formal platform to foster care coordination, advanced care planning, care transitions, medication reconciliation and other areas where improved care management translates into better health outcomes.

Cosán enables patients with chronic conditions to connect more frequently with their doctors or healthcare providers in between scheduled visits. Upon enrolling in one or more of the care management programs, a patient is assigned a chronic care coordinator and clinical team that assists his or her primary doctor with developing a complete care plan that highlights the patient's conditions and goals for care. Patients receive periodic "check-ins" from Cosán's care coordination team based on their individual health record and can be guided through care modules specific to their conditions. Both the assigned care coordination team and support technology provide physicians with regular updates and alerts, thereby enabling them to review care plans, address identified risk proactively, and, if needed, trigger live engagement between care team members, providers, and appropriate community resources. Cosán also offers robust reporting dashboards that provide real-time data on key performance indicators and ensure that every care management activity is time-tracked and pulled into an audit trail that meets Medicare's chronic care management requirements.

Additionally, Cosán provides quality payment program support, scheduling and call center support technology, and a complete clinical staffing solution. Cosán's robust services suite is provided primarily to physician groups, post-acute care and home health organizations, long-term care facilities, health systems, primary care clinics, management service organizations, specialty practices, and federally qualified health centers.

HEADQUARTERS

Independence, Ohio

KEY CONTACTS

David Hunt

Founder and Chief Executive Officer

Mark Sapnar

Senior Vice President – Product Strategy

Michael Knipper

Senior Vice President – Business

Development and Strategic Partnerships

David Magrini

Chief Marketing Officer

ESTABLISHED

2015

COMPANY WEBSITE

cosangroup.com

INITIAL ZLF INVESTMENT DATE

January 2018

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ACTIVE PORTFOLIO COMPANY PROFILES

Curana Health



COMPANY OVERVIEW

Driven by a mission to improve the health, happiness, and dignity of seniors, Curana Health is dedicated to advancing the adoption of value-based care and transforming the care experience for senior living residents.

Curana Health's physician-led care teams specialize in primary and post-acute care for residents in all care and living settings. Our robust network spans 34 states, 1,500+ communities, and serves 120K+ patients annually, delivering high-quality, customized care. Services include medical directorship, short-stay SNF rounding, on-site pro-active primary care, and concierge-style, on-campus clinics. Our 950+ physicians and advanced practice providers work closely with communities to ensure a consistent model of care, reduce staff burden, and enhance the personalized care experience for patients, resulting in superior clinical outcomes.

Curana Health's Accountable Care Organizations (ACOs) support collaborative care coordination and personalized services that transform the care experience. Our ACOs have realized a 13% reduction in emergency admissions and ensured that 89% of patients have completed advanced care plans. Notably, our Medicare Shared Savings Program (MSSP) ACO achieved exceptional results in its inaugural year, ranking in the top 1% in the MSSP Enhanced Track and achieving unprecedented per-beneficiary per-year savings (PBPY) of \$2,235, the highest recorded for any first-year MSSP ACO since 2012. Additionally, our High Needs REACH ACO provides population health management and team-based care for beneficiaries, 80% of whom are dually eligible for Medicare and Medicaid and 93% of whom are long term institutionalized residents.

Curana Health owned and operated Medicare Advantage Plans make care more accessible and affordable for residents while offering new revenue streams and financial sustainability for operators. Our plans have demonstrated remarkable results over the last 10 years including a 39% reduction in total hospital admissions among I-SNP (Institutional Special Needs Plan) members, a 97% rate of satisfaction with clinical services, and a 5-STAR CMS rating (the highest possible). Curana offers flexible models for SNFs and senior living operators to participate with plans — including ownership options.

Curana Health has a proven track record of improving outcomes and satisfaction for residents, while supporting better business performance for operators. Our business lines work together to provide customized services to operators and residents.

Looking to the future, Curana Health continues to innovate. We are approved for the GUIDE Model in 28 states, we are piloting remote patient monitoring and advanced telehealth technologies, and we are expanding our behavioral health capabilities.

Contact us to learn more about how we are transforming the healthcare experience for senior living residents.

HEADQUARTERS

Austin, Texas

KEY CONTACTS

Mark Price
Chief Executive Officer

Conor McCaw
Chief Growth Officer

Amy Kaszak
Executive Vice President, Strategic Initiatives

ESTABLISHED

2021 (Curana Health)
2013 (predecessor, AllyAlign Health)

COMPANY WEBSITES

curanahealth.com
alignseniorcare.com
curanahealthclinic.com

INITIAL ZLF INVESTMENT DATE

August 2018 (AllyAlign Health)

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ACTIVE PORTFOLIO COMPANY PROFILES

Embodied Labs



COMPANY OVERVIEW

Embodied Labs is the leading immersive training platform for caregiving organizations. Using our web & virtual reality-immersive, interactive platform, caregivers embody the first-person complex experiences of the people that are receiving their care and develop actionable empathy.

Over 100+ organizations across the aging care continuum — including senior services organizations, government entities, academic institutions, and Fortune 100 retail health companies — have adopted the Embodied Labs' platform to upskill their own staff and support the informal family and friend caregivers that they serve in their communities. More than 1M professional and informal caregivers have been impacted across 40 states and 5 countries with peer-reviewed, third party research showing improved business outcomes such as increased caregiver competency and confidence, higher caregiver job satisfaction, decreased caregiver burnout, and improved quality of care outcomes for care recipients.

Based in Los Angeles and founded in 2016, the Embodied Labs experience library includes shared immersive experiences such as living through progressing Alzheimer's disease, Parkinson's disease & Lewy body dementia and other types of dementia, experiencing common age-related health conditions such as macular degeneration and hearing loss, and embodying the first person perspectives of other common caregiving situations such as PTSD, trauma-informed care, social isolation, aging in the LGBTQ+ community, and health assessments in complex home and community-based settings.

Currently, Embodied Labs is expanding into new caregiver training areas, such as caregiving for people living with autism spectrum disorder (ASD), dementia search & rescue training for first responders, and other critical topics and is constantly evolving the way that immersive experiences are data-driven and accessible at scale.

Embodied Labs is recognized as a global thought leader in healthcare immersive training with awards including the First Place Bill & Melinda Gates Global Immersive Education Prize and the National AARP Caring for Caregivers Challenge Winner. Media features include Oprah Magazine, CNN-International – Tech for Good, CBS National – The Doctors, and The New York Times.

HEADQUARTERS

Los Angeles, California

KEY CONTACT

Carrie Shaw

Founder and Chief Executive Officer

ESTABLISHED

2016

COMPANY WEBSITE

embodiedlabs.com

INITIAL ZLF INVESTMENT DATE

December 2018

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IncludeHealth



COMPANY OVERVIEW

IncludeHealth is an innovative healthcare technology company focused on delivering accessible virtual physical therapy and patient data collection.

Powered by computer vision, IncludeHealth's platform digitizes physical therapy and delivers personalized, measured, and interactive care directly through patients' devices without additional hardware or downloads.

Recognized with over 40 innovation and health awards, IncludeHealth partners with employers, health plans, providers and the government to deliver accessible and affordable care.

Customers

Hoag Medical Group, TailorCare, NimbleHealth, OrthoForum Value Network, Baylor Scott & White Health, Michigan BCBS, US Department of Veterans Affairs.

What's Included?

1. Dedicated Physical Therapist
2. 40min Monthly Evaluation
3. Personalized Care Plans
4. Interactive & Measured Exercise Sessions
5. Unlimited Secure Messaging
6. Outcomes Reporting

IncludeHealth Virtual PT Pricing

\$150 / Engaged Patient / Month

HEADQUARTERS

Columbus, Ohio

KEY CONTACTS

Ryan Eder

Founder and Chief Executive Officer

Chris Slee

Chief Technology Officer

ESTABLISHED

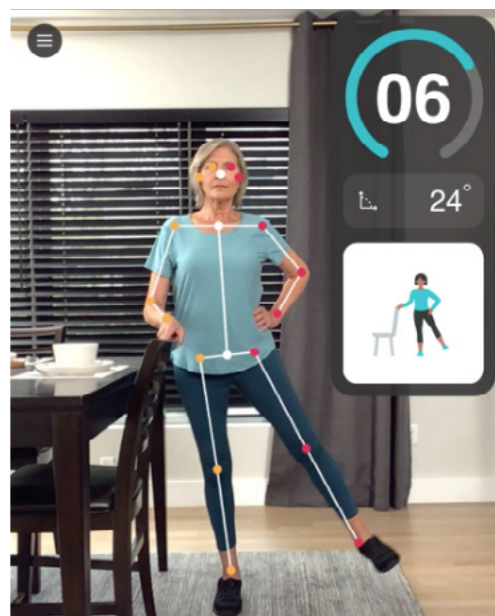
2012

COMPANY WEBSITE

includehealth.com

INITIAL ZLF INVESTMENT DATE

July 2015



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ACTIVE PORTFOLIO COMPANY PROFILES

K4Connect



COMPANY OVERVIEW

K4Connect is a mission-driven company dedicated to providing technology solutions to the Senior Living Space that simplify complex processes, streamline operations, and dramatically increase caregiver efficiencies. By integrating the diverse senior living technology ecosystem into a single, easy-to-use, enterprise-managed platform, K4Connect bridges the gap between technology and senior living. The company's flagship solution, *K4Community*, is the most advanced enterprise solution available, designed specifically to help seniors live more independently, safely, and comfortably while fostering an enriching environment and experience for them, their families, and community staff.

Central to its success is K4Connect's patented Fusion OS, a unique edge-cloud-based hybrid architecture that seamlessly connects and synchronizes data and automates tasks and processes across applications, devices, and services. Using real-time operational, behavioral and health data through automation and integration on one platform, *Fusion OS* is an open framework that allows community operators to address current challenges while building a foundation for future growth and innovation.

Deployed together, *K4Community* and *Fusion OS* promote more autonomy, health, and connection for residents of all ages and acuity. Accessible via mobile/desktop applications, digital signage, or voice-enabled devices, the resident benefits are achieved through various technologies, including smart home automation, communication tools (messaging, video, voice-dialing), social engagement services, and digital content. For operators, *K4Community* and *Fusion OS* offer an advanced digital backend that enhances and optimizes daily operations, providing valuable data and analytics to ensure premium care and hospitality.

K4Connect proudly serves tens of thousands of residents in premier senior living communities across the United States, including non-profit and for-profit operators. From coast to coast, communities select K4Connect as their technology partner to meet today's needs and prepare for their future senior living residents, families, and workforce.

HEADQUARTERS

Raleigh, North Carolina

KEY CONTACT

Mike Weller
Chief Executive Officer

ESTABLISHED

2014

COMPANY WEBSITE

k4connect.com

INITIAL ZLF INVESTMENT DATE

May 2019



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ACTIVE PORTFOLIO COMPANY PROFILES

LifeSite



Life's Information. All in One Place.

COMPANY OVERVIEW

LifeSite is a leading technology company that specializes in empowering individuals to take control of their digital lives. We understand that in today's interconnected world, managing personal information, important documents, and vital records can be challenging and overwhelming. That's why we've developed an innovative platform and applications that enable users to securely store, organize, and share their most critical information. Whether it's managing medical records, financial documents, legal agreements, or family-related information, our platform offers a seamless and secure solution for individuals, families, and even businesses. LifeSite Vault for individuals and families, LifeSite Pro for financial advisors and their clients, and LifeSite Wellness for corporations are used by thousands of individual users and hundreds of business partners.

LifeSite's newest solution TokenX (www.tokenx.is) builds upon the secure storage, organization, and sharing features of the LifeSite data platform, enhancing it with the decentralized, immutable nature of blockchain technology. LifeSite TokenX simplifies the integration of blockchain technology into existing applications, streamlining the complexities of Web3 and NFTs. Web3 tokenization presents a paradigm shift, enabling Web2 companies to access the benefits of decentralization, ownership, authentication, verification, and transparency utilizing the blockchain. TokenX's powerful APIs, tokenize assets with on/off blockchain meta-data, customizable policies and flexible authentication for secure, traceable, and tamper-proof record keeping unlocking new opportunities for sensitive information sharing, customer engagement, monetization and innovation.

HEADQUARTERS

Mountain View, California

KEY CONTACT

Chris Wong
Chairman and Chief Executive Officer

ESTABLISHED

2015

COMPANY WEBSITES

lifesite.co
tokenx.is

INITIAL ZLF INVESTMENT DATE

August 2017

ZIEGLER LINK•AGE MANAGEMENT

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ACTIVE PORTFOLIO COMPANY PROFILES

Lifespark



COMPANY OVERVIEW

Lifespark is a complete senior health company providing a scalable, global risk delivery system designed to serve seniors fully by helping them age magnificently, reduce high medical spend, improve experience, and produce strong health and life outcomes. What makes Lifespark different is its geriatric medical expertise, a Complete Life Record — technology and analytics to lower cost and prove efficacy, and a single point of contact to coordinate services around the member. Lifespark's whole person model provides robust senior services including primary care, home health, private-pay, hospice, senior living, pharmacy, and social determinants of health (SDOH) services.

The company can respond rapidly to clients' needs, including those with complex health, plan for the unexpected, and provide appropriate services with the proper communication for seniors and their families.

Lifespark's flagship offering, Lifespark COMPLETE™ is a comprehensive senior health service designed to help seniors stay healthy at home, navigate their health options with confidence, and live fuller, more independent lives. This proactive and predictive approach is proven to keep seniors off the 'sick care roller coaster', and instead, age magnificently. Lifespark COMPLETE™ is available to members through participating health plans at no additional cost.

Lifespark COMPLETE™ includes the following services:

Geriatric Expertise: Providers including physicians and APPs (advanced practice professionals) provide in-home geriatric medical expertise including geriatric consult, medication review, in-home labs and x-rays all to recenter health around the person.

Single Point of Contact: A licensed professional, provides a single point of contact for a seniors' everyday health needs, coordination of services, centralized communication for health goals with providers and family members, connections to resources, regular check-ins, and develops personalized life planning to achieve health and life goals.

Complete Life Record (CLR): Lifespark's proprietary integrated tech platform seamlessly combines broad medical and SDOH capabilities, data, and client experience including information that matters to a person's health that is often left out of their file. The CLR provides easier coordination for the members' whole health team even if their PCP or other specialists change and is designed to identify patterns to improve health across the entire system.

Urgent Response Services: Includes Lifespark's on-demand, Mobile Urgent Responders who respond in-home to acute, emerging issues to avoid unneeded ER visits. We already know each member and their contingency plans — the actions they prefer in advance of an urgent need. That means not only are we responding quickly but we are aligning treatment plans to their life plan and preventing seniors and their families from long waits in an ER when a visit is not needed.

Transition Services: Provides support, advocacy, guidance, and coordination for a timely return home if an ER/hospital admission is necessary.

Telehealth: Lifespark offers a variety of telehealth services, including remote monitoring, virtual doctor visits, and medication management.

Access to a full continuum of holistic services: Lifespark provides a variety of home-based services which includes private-pay nursing and caregiving, Medicare skilled home health, hospice, and access to senior living to provide a seamless continuity of care when appropriate.

Community resources: Connections to vetted resources to support members' goals including transportation (Lifespark GO!), home modification, exercise/training, dog walkers, etc. whatever the member needs to live on their terms.

HEADQUARTERS

St. Louis Park, Minnesota

KEY CONTACT

Joel Theisen, BSN, RN
Founder & Chief Executive Officer

ESTABLISHED

2004

COMPANY WEBSITE

lifespark.com

INITIAL ZLF INVESTMENT DATE

July 2023

ZIEGLER LINK•AGE MANAGEMENT

790 N. Water Street, Suite 2275
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B.C. Ziegler and Company | Member SIPC & FINRA

CONTACT US

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ACTIVE PORTFOLIO COMPANY PROFILES

MyTown Health Partners



COMPANY OVERVIEW

MyTown was built with a vision of ensuring parity and access to comprehensive healthcare for families in rural areas of the country. MyTown partners with excellent, high-quality providers to further support their efforts, expand services and locations, integrate value-based models, and provide a best-in-class solution to both patients and other stakeholders in the process.

We center respect, integrity, teamwork, and excellence.

HEADQUARTERS

Pittsburgh, Pennsylvania

KEY CONTACT

Matthew Flynn
Chief Executive Officer

ESTABLISHED

2022

COMPANY WEBSITES

www.mytownhealthpartners.com

INITIAL ZLF INVESTMENT DATE

December 2016 (in CityLife Health)

ZIEGLER LINK•AGE MANAGEMENT

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ACTIVE PORTFOLIO COMPANY PROFILES

Payactiv



COMPANY OVERVIEW

Payactiv is a holistic financial-wellness platform that provides your employees on-demand access to their earned but unpaid wages.

Earned Wage Access (“EWA”) is a service needed by two-thirds of the U.S. workforce. It is not a loan; there are no hidden fees or interest charged, and funds accessed are deducted from upcoming paychecks when payroll is processed. Employees love Payactiv because it eliminates the expensive between-paycheck toll of payday loans, bank overdrafts, and late fees.

In addition to instant access to earned wages, the Payactiv app provides saving and budgeting tools and an award-winning digital wallet in one convenient location irrespective of a user’s banking or credit status. Users can sign up for the Payactiv Visa® Card that allows real-time access to EWA 24/7/365, free P2P transfers, and contactless payments. Payactiv users also have the flexibility to transfer their wages to existing cards or bank accounts and use their EWA to pay for Uber, shop on Amazon, or pick up as cash from Walmart.

Businesses that partner with Payactiv see significant cost reductions through increased recruitment, engagement, and retention. In fact, Payactiv clients across multiple industries have reported a 98% employee satisfaction rate, a 30% reduction in turnover, and up to 80% adoption rates. Importantly, the company’s simple implementation and zero setup or recurring costs let clients offer financial wellness without obstacles. Payactiv services are available in all 50 states, and employees can enroll and access services from anywhere via the Payactiv website or the Payactiv mobile app.

Payactiv has won best in-class awards in both the FinTech and HRTech sectors and has provided EWA to thousands of clients including Five Star Senior Living, Fedex, Wayfair, Mercy (St. Louis) and Walmart. Payactiv serves thousands of employees and industries across the board — restaurants, factories, hospitals, retail stores and many more, helping employees avoid financial stress. Payactiv’s commitment is to easing the burden of living paycheck to paycheck while also giving employees the tools to build healthy financial habits.

- [Payactiv for Businesses](#)
- [Payactiv Earned Wage Access](#)
- [Payactiv’s Holistic Financial Wellness Platform](#)
- [Payactiv Wins the 2021 BAI Global Innovation Award in Human Capital](#)
- [Payactiv Named a Silver Winner In the Most Socially Responsible Company of the Year category in best in biz awards 2021](#)

HEADQUARTERS

San Jose, California

KEY CONTACT

Helen Schulter
Director of Channel Sales

ESTABLISHED

2012

COMPANY WEBSITE

payactiv.com

INITIAL ZLF INVESTMENT DATE

September 2018



ZIEGLER LINK•AGE MANAGEMENT

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ZIEGLER LINK•AGE FUNDS

ACTIVE PORTFOLIO COMPANY PROFILES

PS Salon & Spa



COMPANY OVERVIEW

PS Salon & Spa was founded in 2008 with the simple goal of transforming senior community “beauty shops” into professional salons and spas. Today, the company operates over 1,400 licensed salons within senior communities and provides professional service and products to hundreds of thousands of resident, family, and caregiver clients in 36 states. PS Salon & Spa has built a staff of over 1,900 licensed and vetted employee professionals who support and operate the company’s salons.

The company developed and launched its own point-of-sale technology platform in 2019, including a “Celebration Account” spend and rewards feature for residents and families (similar to the Starbucks Card™ concept). This technology seeks to enhance data and information analytics for PS’s core salon and spa operations and was built with the intention of being flexible enough to permit integration with other resident engagement and consumer-facing technology platforms in the market.

In addition to its salon and spa management services, **PS Design & Procurement** also is intended to deliver expertise and consultation services in senior community salon and spa design, space planning, professional equipment selection, and procurement. The company’s PS D&P Team seeks to integrate services with architects, designers, developers, and purchasing departments to ensure licensure of the space and create a stronger long-term ROI for the salon investment.

PS intends to continue to provide dignified lifestyle experiences for seniors, boost the marketability of its partner communities, and offer revenue share opportunities with each service and retail purchase, all while simultaneously enhancing resident and family satisfaction.

HEADQUARTERS

Cleveland, Ohio

KEY CONTACT

John Polatz
Chief Executive Officer

ESTABLISHED

2008

COMPANY WEBSITES

salonps.com
psdesignandprocurement.com

INITIAL ZLF INVESTMENT DATE

January 2019

ZIEGLER LINK•AGE MANAGEMENT

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ACTIVE PORTFOLIO COMPANY PROFILES

Season Health

SEASON

COMPANY OVERVIEW

Season Health is the only integrated Food-as-Medicine Platform that drives engagement, health outcomes and total cost of care reduction for health plans, individuals and employers across populations. Season's holistic approach recognizes that addressing chronic conditions requires more than just access to healthy food — it requires ongoing clinical support, nutrition education, and culturally-sensitive care.

Season's all-in-one Food-as-Medicine solution includes:

- One-on-one clinical support: Season's Registered Dietitians see referred patients in 2-3 days, drive education and long-term behavior change in patients, and provide clinical support in 15+ languages.
- Food Market: Patients have access to medically-tailored, culturally-relevant meals and recipes that can be delivered right to their door. Season offers more than 100,000 recipes across 14 cuisine types with an average cost per serving of approximately \$3.00.
- Benefits Bank: Integrated food benefits all in one place, easy to find and ready to use.

This integrated approach drives both patient engagement and clinical outcomes. Season patients attend an average of three dietitian visits in the first 90 days, receiving care for a range of chronic conditions. As an example, patients with diabetes who have a starting HbA1c greater than 9 experience an average drop of 1.7 points during that time period, reducing total cost of care.

By combining evidence-based clinical care from dietitians with access to affordable medically-tailored meals and groceries, Season empowers individuals and their families to make informed, sustainable choices, measurably improving both health outcomes and quality of life. Season's market-leading patient volumes, with the resulting personalization and breadth of food offerings, makes the organization a preferred referral partner for provider groups and community-based organizations such as food pantries.

Season is working towards a future where food-as-medicine is so prevalent that it becomes synonymous with food itself. In this envisioned future, every individual's primary food environment is shaped by Season's Food-as-Medicine Platform, which significantly contributes to their overall health. Traditional obstacles such as cost, taste, convenience, and knowledge no longer hinder access to nutritious food. Health plans embrace this new reality for their entire population, recognizing its cost-effectiveness in addressing chronic diseases. Consequently, Season aims to reduce the incidence of chronic diseases associated with poor nutrition and make a positive impact on public health.

HEADQUARTERS

Austin, Texas

KEY CONTACT

Josh Hix

Founder & Chief Executive Officer

ESTABLISHED

2020

COMPANY WEBSITE

www.seasonhealth.com

INITIAL ZLF INVESTMENT DATE

October 2023

ZIEGLER LINK•AGE MANAGEMENT

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ACTIVE PORTFOLIO COMPANY PROFILES

ShiftKey + OnShift



COMPANY OVERVIEW

ShiftKey is a technology company committed to transforming access and integrity in the workforce. By leveraging data and a marketplace approach to connect independent licensed professionals with facilities with open workforce needs, ShiftKey is playing a vital role in advancing empowered work, stability and solutions for professionals, facilities and the people they serve. With 10,000 healthcare facilities and hundreds of thousands of independent licensed professionals on the platform, ShiftKey is the market leader in strategic workforce solutions, driving a more sustainable, inclusive and profitable workforce economy for the future.

OnShift, a ShiftKey brand, delivers next-generation workforce management with modern, world-class scheduling software. OnShift's innovative approach to workforce solutions fosters a culture where people want to work. Post-acute care facilities rely on OnShift's software and services to reduce turnover rates, decrease costs and improve the quality of care.

SAMI, Schedule Automation Marketplace Integration, delivered by ShiftKey + OnShift, is award-winning technology that provides a complete view of a facility's schedule — showing their employees and independent healthcare professionals in one place — giving them the tools to build a complete schedule proactively and cost-effectively.

- Rev up your revenue: In one year, the majority of SAMI customers grew their census 4x more than the national average census growth rate, resulting in an estimated average \$1.2M revenue increase per building.
- Don't blow your budget: With SAMI, schedulers saved 51,000 hours and facilities saved an estimated \$760,000 on administrative hours alone.
- Deliver the care they deserve: SAMI customers reduced unfilled shifts up to 90%, helping their teams beat burnout and increase quality of care.
- Ditch your agency: SAMI users cut agency hours by 45%.
- Engage your team: Employees at SAMI-enabled facilities made up to 71% more shift requests.

What's New

- SAMI has earned OnShift and ShiftKey awards from Fast Company and McKnight's for innovative technology.
 - Tech Partner of the Year Silver Award, Skilled Nursing track, McKnight's Excellence in Technology Awards, OnShift + ShiftKey
 - Most Innovative Companies in 2024, Fast Company, ShiftKey
- ShiftKey now has an app for facilities — whether you manage the schedule for multiple facilities or manage the schedule between delivering care, ShiftKey Facilities app makes your job easier
- OnShift launched OnShift Schedule X, a modern scheduling technology that provides critical data and actionable insights to drive strategic workforce decisions at scale. OnShift Schedule X's intuitive workforce technology has a 100% scheduler satisfaction rating and has helped communities reduce overtime hours by 50%.

Key Achievements

- Over 5.8 million shifts per month are scheduled using OnShift.
- More than 600+ facilities have filled 245,000 shifts with SAMI since SAMI launched in 2023.
- 359,000+ pulse, new hire, and custom surveys are conducted per month using OnShift's employee engagement software, capturing critical employee feedback and actionable insights.
- Nearly half a billion dollars in early wages have been accessed via OnShift Wallet, our financial wellness solution, since the solution was released.
- 140,000+ independent professionals on the ShiftKey platform
- 6,900,000+ completed shifts via the ShiftKey platform

HEADQUARTERS

Cleveland, Ohio (OnShift)
Dallas, Texas (ShiftKey)

KEY CONTACT

Mike Vitek
Chief Executive Officer

ESTABLISHED

2008 (OnShift)
2016 (ShiftKey)

COMPANY WEBSITE

onshift.com
shiftkey.com

INITIAL ZLF INVESTMENT DATE

September 2018

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ACTIVE PORTFOLIO COMPANY PROFILES

Socially Determined



COMPANY OVERVIEW

Socially Determined is the Social Risk Intelligence™ company for organizations committed to addressing the Social Determinants of Health (SDOH) for better health outcomes, optimal business performance, and improving health equity.

There is a mandate across the healthcare ecosystem to understand the effect of SDOH on communities and populations. Systemic social risk factors like economic strain, food insecurity, transportation barriers, health literacy, and more drive poor health, excessive costs, suboptimal utilization, and poor quality. It is challenging for organizations to quantify the impact of these key contributors to health on their own and little exists in the form of measurement consistency.

Through a HITRUST-certified Social Risk Intelligence platform, SocialScape®, and team of domain experts, Socially Determined gives clients full visibility into the contours and concentrations of their population's social risk. With this unobstructed view, organizations such as health plans, life sciences companies, large employers, and nonprofits can derive unmatched insights to see who is impacted by social risk and why it matters. Armed with these insights, our clients are empowered to proactively intervene and address the needs of their populations through precise strategic, focused, and sustainable programs. In addition, clients can measure the impact of these initiatives in a standardized and repeatable way to drive future decisions around community investments and resource allocation.

To identify and support execution of high-ROI interventions, Socially Determined employs the SocialScape platform to fuse clinical, financial, and community data; apply advanced analytics; and provide visualizations (and data sets) to our clients.

Key offerings include:

- **SocialScape®:** the marketing-leading interactive, web-based platform allowing users to identify where high concentrations of social risk exist at a granular level and then quantify the opportunities that will drive the most significant impact.
- **SDOH Risk Metrics:** Indices for each major SDOH area created from Socially Determined's learning algorithms. These indices indicate social risk for each individual person and community within a population of interest without the need for screening questionnaires.
- **Opportunity Analysis:** Our team of experts partner with our clients to help prioritize actions for investment optimization and outcomes.

Socially Determined's founding team features executives with experience building companies from startup to exit, and the company has an Advisory Board of industry experts and veterans that can help guide the company's strategy and access to the market.

HEADQUARTERS

Washington, D.C.

KEY CONTACTS

Trenor Williams, MD
Chief Executive Officer and Founder

Ryan Bosch, MD
President and Founder

ESTABLISHED

2017

COMPANY WEBSITE

sociallydetermined.com

INITIAL ZLF INVESTMENT DATE

March 2018



ZIEGLER LINK•AGE MANAGEMENT

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ACTIVE PORTFOLIO COMPANY PROFILES

Strategic Health Care



COMPANY OVERVIEW

Strategic Health Care (“SHC”) is a consulting firm focused on helping providers improve their businesses’ bottom lines. The company, founded in 1994, seeks to develop statewide managed care contracting networks, provider credentialing, care coordination, and navigation of IT solutions. Additionally, the firm’s office in Washington, D.C., gives health systems and other providers unique opportunities to impact government laws and regulations. This involves health policy development and advocacy, coalition management, government forecasting analyses, regulatory impact analyses, and identifying federal funding opportunities.

SHC seeks to effectively present its clients’ positions to legislators and policymakers, while correspondingly seeking to achieve results that assist with client objectives. The company has represented its clients with respect to health care legislation enacted by Congress and implemented by federal agencies for more than 20 years. This includes budget and appropriations matters; new payment systems for hospitals, ambulatory providers, and physicians; CMS pilots and demos; managed care; health care reform; health care information privacy; physician self-referral; maintenance of tax-exemption status for nonprofits; programs and funding for federal research agencies; and drug and medical devices reform.

In 2016, SHC acquired CivicHealth, whose technology solutions enable connectivity and collaboration between multiple providers, health care networks, and human services organizations across communities. In addition to managing chronic care issues, the CivicHealth solution is also designed to provide caregivers a tool that manages the social determinants of health. In 2020, the CareScope database which CivicHealth was built on was expanded to meet the needs of Strategic Health Care’s clients. Contract management and credentialing platforms were developed in an effort to better serve managed care clients. Also, the CivicHealth team developed the logic to determine the shared savings in episodic bundles. The company believes this will assist its managed care clients to enter into shared savings agreements with payors, armed with the tools to track their progress in this value-based reimbursement model.

HEADQUARTERS

Washington, D.C.

KEY CONTACTS

Paul Lee

Senior Partner and Founder

Barbara Sears

Partner

Carolyn Roten

Partner for Managed Care Contracting

ESTABLISHED

1994

COMPANY WEBSITE

strategichealthcare.net

INITIAL ZLF INVESTMENT DATE

October 2014 (in predecessor company, CivicHealth)

ZIEGLER LINK•AGE MANAGEMENT

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ACTIVE PORTFOLIO COMPANY PROFILES

TCARE



COMPANY OVERVIEW

TCARE is the leading evidence-based caregiver risk management platform designed to prevent caregiver burnout, both at work and at home. Its patented clinical protocol combines more than 15 years of caregiver insights, advanced data analytics and a robust digital platform with personalized human support to identify, mitigate, and continuously monitor caregiver burnout risk.

Caregiving is challenging and has emotional, physical, and financial impacts. By identifying the root causes of stress and pressure for the caregiver, TCARE can lessen those burdens through regular engagement, evaluation, and identification of changing factors throughout the caregiver's professional and personal journey.

The TCARE Platform is a digital-forward solution combined with care management services. The system consists of integrated features which are deployed on a customer-specific basis to drive optimal outcomes. These features include:

Engagement platform: Multi-channel digital platform to support enrollment and ongoing engagement of caregivers. The member portal allows caregivers to complete a self-screener to identify their risk level, supports regular check ins with their dedicated Specialist, and provides direct access to content and a robust resource database.

Assessment platform: Core evaluation platform used by the team of certified TCARE Specialists to support all assessment workflows including caregiver assessment, execution of clinical decision algorithms, and the completion of the personalized care plan. The automated assessment process uses 96 intent-to-place variables, 44 core treatment pathways and leverages 168 resource categories.

Resource database: Curated databased of local and national resources. Provides caregivers with direct access to TCARE's resource repository, search capabilities, and referrals.

Data & analytics: Population Health data infrastructure to identify continuous improvement for aging-in-place opportunities. Supports existing and opportunistic operational, outcome, and consumer metrics, algorithms, and machine learning.

Providing caregivers with the tools and resources they need, at the right time and the right place, drives improvement in engagement, productivity, and retention, reduces times away from work or missed shifts, and leads to improvement in the caregiver's overall health status as they care for others.

HEADQUARTERS

St. Louis, Missouri

KEY CONTACT

Ali Ahmadi
Chief Executive Officer

Lindsey Niemeier
President

ESTABLISHED

2017

COMPANY WEBSITE

tcare.ai

INITIAL ZLF INVESTMENT DATE

September 2022

ZIEGLER LINK•AGE MANAGEMENT

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ACTIVE PORTFOLIO COMPANY PROFILES

Third Eye Health



COMPANY OVERVIEW

Third Eye Health is the leading virtual care company in post-acute and long-term care. The company is focused on providing expert medical care at the bedside, ensuring the patient and resident gets the right care, at the right place, at the right time to help prevent unnecessary trips to the hospital. During nights, weekends and holidays, Third Eye Health offers immediate virtual access to post-acute experienced physicians, nurse practitioners and physician assistants through its proprietary technology, integrated into workflow and existing electronic health records systems, paired with a care coordination system and analytics and reporting platform. Third Eye Health is growing rapidly with almost 1,000 customers, including the leading skilled nursing chains, senior living, primary care provider groups, accountable care organizations, health systems and insurers.

Virtual Care at Work

Third Eye Health's EHR-integrated mobile technology virtually connects post-acute nurses to a provider within minutes, working in tandem via text message, video chat and medical data exchange to care for patients as soon as a need is identified. Third Eye Health operates as a centralized integrated platform managing all virtual encounters. Their proactive risk identification tool creates a seamless integration between local providers and Third Eye Health providers to match and integrate their protocols and clinical guidelines. SNF administrators and nurse leaders rely on Third Eye Health's analytical reporting tools to optimize care and quality.

Proven Results

Leading national and regional skilled nursing chains, senior living, primary care provider groups, accountable care organizations, health systems and insurers rely on Third Eye Health's services and technology. To date, the organization has served almost a million patients and has maintained a 92% average treat-in-place rate since its inception. Currently, the organization serves almost 1,000 skilled nursing facilities, over 12,000 nurse users, and almost 200,000 patients annually across 32 states. Using Third Eye Health, organizations have, on average, reduced their 30-day readmissions by over 25%, preventing value-based penalties while strengthening relationships with local health systems and insurers. Third Eye Health's comprehensive services and technology bring positive financial returns to SNF operators who experience improving quality metrics and census; primary care provider groups who see provider retention and recruitment benefits; and insurers who see reductions in costly, unnecessary hospitalizations.

HEADQUARTERS

Chicago, Illinois

KEY CONTACT

Dan Herbstman
Co-founder and Chief Executive Officer

ESTABLISHED

2014

COMPANY WEBSITE

thirdeyehealth.net

INITIAL ZLF INVESTMENT DATE

December 2018

ZIEGLER LINK•AGE MANAGEMENT

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ACTIVE PORTFOLIO COMPANY PROFILES

TSOLife



COMPANY OVERVIEW

TSOLife is a resident insight and experience platform, designed to empower senior living operators with actionable insights that facilitate real-time data-driven decisions.

Elevating Senior Living Through Person-Centered Data

Powered by artificial intelligence (AI), our platform simplifies data creation through embedded analytics, offering customers person-centered data that leads to measurable enhancements in residents' quality of life, transformative outcomes for staff, and a complete redefinition of senior living operations. With TSOLife, you unlock a range of innovative features including:

1. **Automated Data Collection:** Our platform uses cutting-edge voice-to-text technology to transcribe audio interviews, replacing manual data entry and saving staff time by extracting over 150 data points in just 30 minutes.
2. **Digital Resident Profiles:** Our platform creates searchable, easily accessible digital profiles, saving teams an average of two hours per resident by eliminating manual entry and enabling quick retrieval of essential details.
3. **Actionable Insights:** Our platform provides AI-powered notifications that offer personalized insights and automatic recommendations, enhancing daily engagement and fostering meaningful interactions with residents.
4. **Quality of Life (QoL) Assessment:** Our platform monitors resident well-being by capturing QoL data during interviews, enabling users to track progress, identify residents needing support, and measure the impact of interventions and programs.

Reimagining the Resident Experience

TSOLife goes beyond AI technology to deliver enhanced resident engagement tools, empowering you to plan activities tailored to residents' interests. Instantly promote these activities through digital signage, professional-quality newsletters, and family communications. With our platform, you can make informed decisions to improve resident satisfaction and long-term retention, all managed from a single, user-friendly interface.

1. **Resident Friend-Matching:** Foster a connected and supportive community environment with our intuitive resident friend-matching tool, facilitating meaningful connections and friendships.
2. **Business Intelligence Dashboards:** Gain powerful insights with our dashboards, tracking resident engagement, QoL, and other essential metrics to inform programming, marketing strategies, and community operations.
3. **Sales and Marketing Dashboards:** Elevate your efforts with comprehensive dashboards providing valuable insights for targeting and planning, enhancing tour experiences and interactions with prospective residents.
4. **Digital Signage:** Keep communities informed and engaged with our integrated display system, delivering instant updates and announcements.
5. **Intuitive Calendar Management:** Create activity calendars with event recommendations based on inclusivity scores, saving time while ensuring activities are tailored to residents' interests.
6. **On-Demand Content:** Access an expansive library of over 2,500 pieces of resident-centered content, conveniently searchable and printable through our platform.

HEADQUARTERS

Tampa, Florida

KEY CONTACT

David Sawyer
Chief Executive Officer

ESTABLISHED

2014

COMPANY WEBSITE

tsolife.com

INITIAL ZLF INVESTMENT DATE

September 2022

ZIEGLER LINK•AGE MANAGEMENT

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ACTIVE PORTFOLIO COMPANY PROFILES

VirtuSense



VIRTUSENSE™

COMPANY OVERVIEW

[VirtuSense Technologies](#) enables nurses, therapists, and caregivers to leverage predictive AI for proactive fall and injury prevention. Organizations across the USA leverage the LIDAR and AI tools in VirtuSense solutions to provide their clinicians with predictive alerting and engagement platforms to address falls before they happen. This translates to better quality outcomes and lower cost for residents and providers. VirtuSense currently serves over one thousand organizations and hundreds of thousands of seniors across long-term care and senior living.

VSTBalance – Identify Seniors at Fall Risk

VSTBalance is an automated fall-risk assessment system for a preventative approach to senior care. It uses AI and machine vision to objectively identify deficits in balance, gait, and function — the three leading indicators of fall risk, all in under 2 minutes. Clinicians use this data to create more effective care plans for long-term fall prevention. VSTBalance has helped reduce falls by as much as 60% in hundreds of senior living organizations across the United States. Friendship Village won Gold in the 2023 McKnight's Technology Awards, "Innovator of the Year" category, for their transformative care with VSTBalance.

<https://www.virtusense.ai/products/vstbalance/>

VSTAlert – In-Room Predictive Alerting Before a Fall

VSTAlert is a predictive monitoring system for high fall-risk residents. Rather than alerting staff after a patient has already left their bed, it uses machine vision sensors and AI to recognize a patient's intent 31–65 seconds before they exit their bed or chair. The system is 99.9% accurate, sending less than 0.5 false alerts per day. VSTAlert has reduced falls in skilled nursing organizations by as much as 82%. John Knox Village and United Methodist Communities were McKnight's Tech Awards "Innovator of Year" winners in 2022 and 2021 respectively for reducing falls with VSTAlert.

<https://virtusense.ai/vstalert/>

VSTAlert for Senior Living – Tailored Fall Prevention for Memory Care/AL

In-room fall monitoring with VSTAlert allows residents to maintain their routines without risking their safety and mobility. Fall risk can vary dramatically between residents in assisted living and memory care, VSTAlert Senior Living customizes monitoring for each resident's needs. The solution can monitor both high- and low-fall-risk residents for protection when they need it and freedom when they don't. The Forum at Rancho San Antonio won Gold for "Quality" in the 2024 McKnight's Tech Awards for their use of VSTAlert to reduce falls with injury by 80%.

<https://www.virtusense.ai/solutions/al-memory-care>

HEADQUARTERS

Peoria, Illinois

KEY CONTACT

Deepak Gaddipati
Founder and Chief Technology Officer

ESTABLISHED

2012

COMPANY WEBSITE

virtusense.ai

INITIAL ZLF INVESTMENT DATE

December 2018



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ACTIVE PORTFOLIO COMPANY PROFILES

VitalTech



COMPANY OVERVIEW

VitalTech® envisions being the most trusted partner in virtual, proactive care. Our technology is created with caregivers, patients, and families in mind. We strive to provide solutions that improve patient outcomes, enhance patient safety, and reduce risk while increasing revenue.

The success of our clients is at the core of what we do, driving our continual efforts to build customizable solutions with flexibility and scalability to fit the needs of each client and their patients, beginning with scalable architecture designed from the ground up to support AI and machine learning. We start each journey with our clients by breaking down their needs to get a deep understanding of their goals in order to provide the best possible set of solutions that fit within existing workflows, lowering caregiver burdens and providing them with tools to concentrate on patient care as opposed to administrative work and data mining.

- **VitalCare** – The company's user-friendly interface is not just easy to use, it's designed to be intuitive. It seamlessly integrates vital signs, nutritional inputs, medication reminders, and simple communication tools to interact with care teams and families remotely. Through connected care and increased engagement, VitalCare empowers users to increase care plan compliance.
- **VitalCare Admin** – VitalCare Admin is a single interface designed to allow providers to monitor vital signs, manage activity tracking and alerts, send medication reminders, and answer telehealth calls. The company believes this is helpful for caregivers and care teams. VitalCare Admin is intended to offer insights into patients' day-to-day lives and help generate actionable tasks, alerts, and data to provide care proactively. The system is designed to fully interact with most major EHRs, making it an easy and pain-free addition.
- **VitalCare Family** – The VitalCare Family App was designed to allow family members to stay connected to their loved ones anywhere, anytime. It allows users to view vital signs, track medication adherence, track nutrition, use video and audio calls, send messages, and set gentle reminders from any smart device.

VitalTech's digital solutions are comprehensive and cater to numerous parties across the care continuum. From independent living to home care, assisted living, and transitional post-acute facilities, we have you covered. Our aim is to provide a seamless and integrated experience for all healthcare settings, ensuring you have the tools you need, when you need them.

HEADQUARTERS

Plano, Texas

KEY CONTACT

Steven Scott

President and Chief Executive Officer

ESTABLISHED

2018

COMPANY WEBSITE

vitaltech.com

INITIAL ZLF INVESTMENT DATE

February 2020

ZIEGLER LINK•AGE MANAGEMENT

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ACTIVE PORTFOLIO COMPANY PROFILES

Vynca



COMPANY OVERVIEW

Over 14 million adults and children in the US are living with a life-limiting serious illness, and they often need and desire palliative care while pursuing treatment. Vynca addresses this problem by providing technology-enabled, community-based supportive and palliative care. Vynca offers comprehensive and convenient care that proactively addresses patients' complex medical and psycho-social needs. Vynca's industry-leading advanced care planning ("ACP") software provides patients and their providers with a digital means of creating, storing, and sharing goals of care and end-of-life planning documents seamlessly within commonly used electronic health record systems. With over one million digital ACP documents in the Vynca network and a strong track record of providing high-quality care for over fifteen thousand seriously ill individuals, Vynca is well-positioned to provide personalized supportive and palliative care solutions for our health plan and health system partners.

Through personalized palliative care services, enhanced care management, and digital ACP, Vynca ensures seriously ill and complex patients receive high-quality, goal-concordant care from a physician-led interdisciplinary team. The company's technology and analytics suite enables its clinical team to scale community-based palliative care services, monitor patient progress remotely, anticipate and prevent acute disease exacerbations, reduce provider administrative burden, and better engage individuals through both in-home and virtual visits.

The company has demonstrated that its hybrid approach to supportive and palliative care yields high patient satisfaction (92%) and engagement, reduces symptoms by 81%, reduces avoidable emergency department (ED) and inpatient visits, and generates a 3 to 1 return on investment for health plan sponsors.

Health system clients can use Vynca's ACP software to increase provider and patient engagement in advance care planning. In a study of 5,700 ED visits, the solution demonstrated a 37% reduction in hospitalizations and a 59% reduction in intensive care utilization.

When individuals have convenient access to palliative care, and their care preferences are known, care quality improves, avoidable acute care is reduced, and total healthcare costs are lowered.

HEADQUARTERS

San Mateo, California

KEY CONTACT

Darren Schulte, MD
Chief Executive Officer

ESTABLISHED

2013

COMPANY WEBSITE

www.vyncacare.com

INITIAL ZLF INVESTMENT DATE

November 2015

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