ZIEGLER LINK•AGE FUND FAMILY
ACTIVE PORTFOLIO COMPANY PROFILES

JULY 2025

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ACTIVE PORTFOLIO COMPANIES

Aaniie® Formerly Smartcare Software	**Access** TeleCare	**Alix**	**arena**
At Home Harmony	**BLUESTAR** TELEHEALTH	**Bluestone** Physician Services™	**Cascala**
COACHCARE	**cosán**	**CURANA HEALTH**™	**embodied labs®**
K4 CONNECT	**LainaHealth**	**LifeSite** Life's Information. All in One Place.	**Lifespark**™
MyTown HEALTH PARTNERS	**PS** SALON & SPA	**payactiv**	**SEASON**
shiftkey + OnShift	**SOCIALLY DETERMINED**	**STRATEGIC HEALTH CARE**	**TCARE**
TSOLife	**ThirdEyeHEALTH®**	**VIRTUSENSE**™	**Vynca**

DETAILED OVERVIEWS

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Aaniie®

The Fastest-Growing Workforce Management Platform.

Inc. 5000 — AMERICA'S FASTEST-GROWING PRIVATE COMPANIES

Home & Personal Care • CCRC & Senior Living • Childcare Placement • Multi-Site & Franchise

Value-Based Care	Talent Acquisition	Satisfaction Tracking	Workforce Management	Reports & Compliance	CRM & Marketing	Payroll & HRIS	Engagement & Retention
Reduced care gaps	Applicant tracking system	Automated surveys	Time & attendance	Real-time KPIs	Marketing pipeline	Employee Records	Activity Scheduling & Community Calendar
Reduced readmissions	Auto background screening	Caregiver, patient, family satisfaction	Workforce scheduling	Flexible reporting	Electronic onboarding	Early wage access	Performance monitoring
Better care coordination	Electronic onboarding	Survey Alerting	Labor management	Custom reports	Integrated communication	Flexible pay rates	Automated reward system,
Informed decisions	Hiring analytics	Ad hoc surveys	Overtime monitoring	Open API for analytics	Complete client record	Automated payroll	New hire tracking
Improved outcomes	Job board integration	Satisfaction Insights	Communication systems	Multi-site support	Integrated EMR	Payroll provider support	Caregiver/client matching

Aaniie: At a Glance

Aaniie offers all-inclusive workforce & practice management SaaS systems tailored for home care agencies, senior living providers, and childcare placement services. Aaniie provides fully native platforms with all the workflows providers need without extensive third-party integrations to fill gaps, making Aaniie the only system of its kind.

With decades of experience in care technology, we've crafted systems that simplify operations, enhance efficiency, and drive better outcomes. **Aaniie's customers report 40% improved efficiency, 50% faster hiring, 80% reduced billing workloads, and 3x caregiver retention.** By combining automation, connected technologies, and advanced analytics, we help providers focus on what matters most: delivering exceptional care.

Sample Partners Include:

LIFESPACE COMMUNITIES®

Sun Health™ COMMUNITIES

Life Care® Services
An LCS Company

MONTEREAU®

To learn more about how Aaniie can help your community thrive, contact:

Kristin Cummins
Vice President of Sales
773-558-3709
kristin.cummins@aaniie.com

Or visit **Aaniie.com** for more information.

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Alix

Simplifying Estate Settlement

Overview

Alix is an AI-powered estate settlement platform designed to streamline and simplify the complex process of managing a loved one's estate. By combining advanced technology with compassionate human expertise, Alix offers a comprehensive solution that handles every aspect of estate settlement, allowing families to focus on healing.

Comprehensive Estate Management:
Manages everything from locating insurance accounts and transferring property titles to ensuring essential bills are paid, unwanted subscriptions are canceled, and every critical detail is handled with care.

Expert Support
Access to a dedicated Care Team comprising fiduciaries, CPAs, and legal professionals who guide families through each step of the estate settlement process.

Time and Cost Efficiency
Reduces the average time spent on estate settlement from 600 hours and 18 months to a fraction of that, saving families significant time and expenses.

Transparent Pricing
Offers a one-time fee structure charged to the estate, eliminating hourly billing surprises.

User-Friendly Platform
Provides a secure digital portal for tracking progress, uploading documents, and communicating with the Care Team.

1 **Initial Consultation**
Schedule a consultation to discuss your specific needs and understand how Alix can assist.

2 **Customized Plan**
Alix creates a tailored estate settlement plan, outlining the necessary steps and timelines.

3 **Ongoing Task Management**
The Care Team handles key responsibilities such as notifying government agencies, arranging appraisals, and overseeing the distribution of assets.

4 **Ongoing Support**
Alix keeps families informed throughout the process, providing updates and addressing any concerns.

5 **Completion**
Finalize all aspects of the estate settlement, ensuring compliance with legal requirements and the decedent's wishes.

Have an estate to settle? *Let Alix do it.*

meetalix.com   careteam@meetalix.com

Google Play

App Store

arena

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Our AI Delivers:
Smarter Hiring. Stronger Fits. ROI Guaranteed.

At Arena.io, we don't just predict outcomes, we make them happen. Leveraging advanced AI, we provide smarter hiring solutions that go beyond guesswork, ensuring stronger, more effective team fits. Our platform predicts the likelihood of employee success and longevity, offering actionable insights that empower organizations to make faster, better hiring decisions. With cutting-edge AI, we guarantee measurable ROI. Whether you're focused on reducing turnover, accelerating quality placement, driving internal mobility or enhancing overall hiring quality, Arena.io helps your business make smarter talent decisions with precision.

21% Reduction in Turnover due to more accurate job matching and right-fit recommendations (first year average).

95% Accuracy Rate in predicting long-term employee success, ensuring a higher rate of cultural and role fit.

25% Faster Hiring Process through AI-driven candidate recommendations, improving time-to-hire.

4x ROI. Arena delivers exceptional ROI, with a typical return of 4X of client investment within the first year; some as much as 20X.

Predicting success is one thing, but *delivering* it? That's where we shine. Trust Arena.io to transform your hiring, because a better hire means a stronger business. Unlock smarter decisions with predictive intelligence **guaranteed**.

SELECT ARENA CLIENTS FROM THE ZIEGLER LINK•AGE COMMUNITY:

FELLOWSHIPLIFE
ENRICH · TRANSFORM · EMPOWER

Graceworks
Lutheran Services

Jennings

McGregor

THE OHIO MASONIC
COMMUNITIES

To learn more about how Arena can support your workforce, please reach out:
Kelly Russell | Chief Commercial Officer
kelly.russell@arena.io | 508.397.9902

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At Home Harmony

At Home Harmony at a Glace

Partner with a medical practice delivering home-based primary care to complex patients in senior living.

HOME-BASED PRIMARY CARE

Advanced Practice Providers (APPs) round in communities to deliver quality, extensive, home-based care. We build a unique, connected relationship with our patients, families, and the community.

CHRONIC CARE MANAGEMENT

Each of our rounding providers has a nurse care concierge to provide an extension of their care through remote monitoring, specialist referrals, extensive care coordination, and more.

LONG-TERM CARE PHARMACY

Our Long-Term Care Pharmacy can partner with your community to custom package medications, deliver to your buildings, and work directly with care providers to improve medication adherence.

"GUIDE" DEMENTIA PROGRAM

Through our medical practice, your residents living with dementia and their families gain added dementia training, support, and respite dollars. As a result, your care team is supported by our team through dementia care navigation.

We tailor our partnerships to your senior living community's needs.

We can serve as medical director, rounding primary care, pharmacy partner, and/or a vehicle to offer your residents Medicare's GUIDE program for dementia.

Earn quality care incentives and experience happier, supported families while keeping your residents healthier longer.

Thrive at home with true in-home healthcare.

info@athomeharmony.com   804.210.3103   athomeharmony.com

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Bluestone
Physician Services™

Providing Value-Based Care and Great Outcomes to Patients Living with Dementia

Bluestone is a home-based value-based care platform serving individuals with complex physical, mental, behavioral, psycho-social health needs including a majority of people living with dementia.

Who We Are

Our multi-dimensional integrated care model uniquely positions us to partner with a broad range of payors, providers, and senior living communities to improve the quality of care and reduce the total cost of care for this vulnerable patient population.

The average Bluestone patient is 82 years old and manages 7 chronic conditions. More than 60% of Bluestone patients have a dementia diagnosis.

Why Bluestone

Community-Based Mobile Care Model

Our integrated care teams bring Bluestone's services to assisted living, independent living, and group home communities.

High-Quality Care Delivery

We improve clinical outcomes and reduce unnecessary high-cost care episodes including ER visits and inpatient admissions.

Value-Based Care Arrangements

We partner with payors including Medicare (ACO), Medicaid, Managed Care and SNPs to improve quality and reduce cost.

In 2022 and 2023, Bluestone ACO was the #1 performing ACO in the Medicare Shared Savings Program as measured by savings per beneficiary.

Our Services

Dementia Care Management

- Offer dementia care management services in Medicare Advantage, Duals, C-SNPs and I-SNPS for patients with a dementia diagnosis and their caregivers.
- 100 dementia-certified Advanced Practice Providers.
- The Center for Medicare and Medicaid Innovation GUIDE Model participant.

On-Site Primary Care

- Deliver high-quality preventative and acute care supported by tech-enabled, personalized care plans.
- Manage care transitions.
- 17K patients across three states: Minnesota, Florida and Wisconsin.
- Historical shared savings of 18% to benchmark.

Behavioral Health

- Offer integrated mental health services that drive superior clinical outcomes.

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✳ Cascala

Unlock Higher Census, Safer Care, and Stronger Margins in One Platform

Cascala is an AI-enabled clinical intelligence platform delivering real-time risk insights and transition guidance—empowering Skilled Nursing, Home Health, and Long-Term Care providers to accelerate admissions, optimize staffing, and outperform quality benchmarks.

24%
U.S. nursing homes report ongoing staff shortages

18%
Medicare patients discharged to post-acute settings are readmitted within 30 days

40%
SNF margins have eroded since 2019

50%
intake coordinators lack complete information at referral

How Cascala Helps

A powerful, unified solution that integrates seamlessly into your workflow:

✓ Accelerate Intake and Grow Census

AI-generated patient summaries equip admissions teams to make faster, more informed decisions. Faster acceptance keeps referral partners engaged and beds filled.

Align Staffing to Patient Needs

The Resource Intensity Model translates acuity into shift-level staffing guidance, reducing agency spend and improving care consistency.

🛡 Stay Ahead of Risks

Continuous monitoring of vitals, labs, and notes identifies emerging risks early, enabling timely interventions that prevent avoidable hospitalizations.

Simplify Quality and Compliance

Unified dashboards and automated audit trails track performance, support survey readiness, and strengthen value-based care programs.

Ready to see how Cascala can help your teams work smarter?

hello@cascalahealth.com • cascalahealth.com • 867 Boylston St FL 5 #2008 Boston, MA 02116

cosán

Company Overview

Cosán is redefining digital health by combining the power of AI with the compassion of Multi-disciplinary Care Teams. As the first AI-Driven, Team-Based Virtual Care Company we focus on connecting care in between office visits that:

- Helps patients follow their prescribed clinical protocols to stay healthier at home

- Enables providers to operate with greater efficiency and confidence

- Reduces stress in a healthcare system that is defined by fragmentation

- Creates continuity, simplicity, and support that scales human connection through intelligent technology

- Focuses on the whole-health of a patient including mental, functional, and nutritional health, supporting activities of daily living that have a direct impact on outcomes

Satisfied Patient Population
Cosán serves 120,000+ patients nationwide, and enrolls 350 new patients daily. Our Care Coordinators have an NPS score of 86.8.

Clinical Excellence
Deep multi-disciplinary teams create condition-specific care plans across primary and specialty provider patients

AI-Driven
AI-driven care plans and analysis provide real-time patient insights complimented by direct patient conversations, allowing our Care Teams to scale while accelerating the value of our service.

Whole Health Focus
Care plans and services address the patients individual functional, mental, and nutritional health needs

We are proud to work with leading providers across the U.S. like:

GI Alliance

Adventist Health

Urology America

PHC OF PINELLAS

SOLARISHEALTH BETTER TOGETHER

HealthDrive

THE CONRAD | PEARSON CLINIC
CELEBRATING 25 YEARS OF EXCEPTIONAL CARE

For more information about Cosán, please contact:

David Hunt
Founder & CEO

david.hunt@cosangroup.com
508-397-7636
www.cosangroup.com

CURANA HEALTH

Curana Health at a Glance

Curana Health delivers on-site primary, secondary, urgent, and behavioral heath services (led by physician-directed care teams and supported by 24/7 clinical coverage). Curana offers Advanced Primary Care Management (APCM) and the GUIDE model (starting in July 2025) for added support, including those living with dementia and their loved ones.

Curana also offers value-based care solutions that benefit residents and operators alike. Through participation in a Medicare Advantage Special Needs Plan and/or Accountable Care Organization (ACO), operators share savings for their part in supporting comprehensive care coordination.

40% Fewer Hospital Readmissions and **33% Reduction in Emergency Visits** through 24/7 clinical support and advanced technology.

89% Advance Care Planning Completion Rate, improving regulatory compliance and patient-centered care.

95% Satisfaction among residents and caregivers, underscoring the quality and reliability of our care model.

Proven success in addressing critical challenges such as polypharmacy reduction, fall prevention, and labor shortages.

SAMPLE PARTNERS INCLUDE:

Westminster Communities of Florida

Miami Jewish Health

Lutheran Homes of South Carolina

Ohio Living
FAITH + COMPASSION + COMMUNITY

ENSIGN GROUP

WesleyLife

To learn more about how Curana Health can help your communities thrive, reach out to:

Jeff O'Berry, *Executive Vice President of Growth*
571-421-7222 · Jeff.OBerry@CuranaHealth.com
Or visit **CuranaHealth.com** for more information

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K4 CONNECT

K4Connect is a mission-driven AgeTech company helping senior living communities simplify communication, automate workflows, and reduce administrative burdens and costs. Our solutions streamline operations and empower staff with data-driven insights to enhance care, engagement, and resident well-being.

Real Results, Real Impact:

At the core of K4Connect's platform is FusionOS, a purpose-built integration and data management solution for senior living. It connects systems, apps, and devices such as resident apps, digital signage, smart home features, tv solutions, and more than 50 third-party point solutions, giving operators a unified, real-time view of their communities to drive more informed and efficient decision-making.

Visit www.k4connect.com to learn more, read case studies, and explore our partner integrations.

MASONIC VILLAGE

Challenge:
Low resident engagement due to inconsistent updates and time-consuming processes

Solution:
FusionOS Integrations surfaced in Plus App

Results:

87%
boost in resident engagement

2,000+
staff hours saved annually

Our Partners Include

Acts — Where Loving-Kindness Lives

MASONIC VILLAGE

SEQUOIA LIVING℠

front porch

Vivie

Phoebe

UMC Abundant Life for Seniors

Presbyterian SeniorCare NETWORK®

Ready To Connect?

From enhancing resident satisfaction to increasing staff efficiency and driving enterprise-wide visibility, K4Connect helps communities solve their most pressing operational challenges while delivering a better experience for all. Discover how we're building the future of senior living; smarter, simpler, and more connected.

k4connect.com/demo   sales@k4connect.com   919-297-2921

COMPLETE Senior Health
Building Clients-for-Life, Lifetime Value

The only **COMPLETE Senior Health** company with a fully integrated senior housing delivery system, proven to help residents **stay healthy at home, navigate their health options with confidence**, and ultimately **live fuller, more independent lives**.

Geriatric, in-home clinicians proactively address medical and personal needs

Lifespark COMPLETE™

Gamified award-winning platform for resident growth and development

Spark Community-Building

Five levels of response for 24/7 triage, including in-home urgent care

Urgent Response Services

Industry-leading EBITDA performance across 50-sites

Lifespark Senior Living

Skilled Home Health Private Pay Late Life/Hospice

Integrated Path to Late Life

Driving value for residents, owners, payors, investors, and all stakeholders

Top Market Performance

93.3%
Occupancy

+

51% fewer
ER visits

+

30% fewer
Hospital visits

+

27-mos. LOS
(5+ months more than senior living industry average)

+

54 NPS
Senior/Family
(-100 to 100)

+

20+ years
Award-winning culture

Lifespark™

Your COMPLETE Senior Health Partner

Phone: **952-345-8770**

Learn more: **lifespark.com**

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payactiv

$25.2B lost in productivity due to caregiver absenteeism

EARNED WAGE ACCESS INSIGHTS

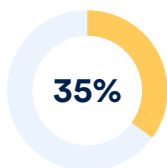# Better Care Begins with Supported Caregivers

The caregiving industry is facing an unprecedented staffing crisis with an industry-wide turnover rate reaching nearly 80%[1]. High emotional and physical demands, coupled with low wages and limited benefits, are driving burnout and turnover. Many caregivers are working long hours while also managing financial insecurity at home.

This workforce volatility strains every part of the business. High turnover and absenteeism drive up staffing costs, limit admissions, and threaten care quality—undermining profitability and long-term viability in an already margin-sensitive industry.
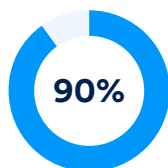
Earned Wage Access (EWA) for Caregiving Teams

Give your caregivers the flexibility to access their earned wages whenever they need with Payactiv. Senior care providers that offer EWA see lower turnover and greater staff satisfaction—directly improving care continuity and operational stability.
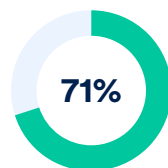
- Give your employees the greatest number of free EWA options in the industry
- Reduce financial stress to improve attendance and care reliability
- Empower employees with budgeting, savings, and bill payment tools
- All in an award-winning app built for caregivers

The Advantages of Payactiv

- ✔ Added employee benefit at zero cost to employers
- ✔ No changes needed to payroll processes or cash flow
- ✔ Automated integration with your existing payroll systems
- ✔ Multiple options for employees to access their wages
- ✔ Compliant in all 50 states

35%
increase in retention among employees who use EWA

90%
of hourly workers want access to on-demand pay

71%
of users say their ability to manage their finances has improved because of Payactiv's EWA[2]

Excellence in FinTech 2024

Tech of the Future 2024

Certified B Corporation

SALES@PAYACTIV.COM

[1] https://homehealthcarenews.com/2024/07/home-cares-industry-wide-turnover-rate-reaches-nearly-80/?utm_source=chatgpt.com
[2] https://www.payactiv.com/impact

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shiftkey + **On Shift**

Simplified workforce management, maximized impact

SAMI optimizes workforce management, offering flexibility and enabling real-time decisions that align with both business goals and resident care. This empowers facilities to increase resident occupancy while maintaining care quality.

Strategic growth and scalability

5x
5x national average census growth rate

77%
77% of SAMI customers increased census

Enhanced financial performance

$1.7M
$1.7 million in annualized savings

$1.3M
$1.3 million average annualized revenue growth per facility

Operational confidence

10K+
Over 10,000 senior care facilities served

45%
45% average reduction in agency usage*

Trusted by leading senior care organizations

Harbor House MINISTRIES

LECOM HEALTH

Silver Bluff Village
SILVER BLUFF · ARROWHEAD COVE · PIGEON VALLEY · THE BLUFFS · SILVER BLUFF REHAB

TOUCHSTONE COMMUNITIES

Learn more at shiftkey.com or onshift.com
*These improvements are based on SAMI customer results. Your results may vary.

TCARE®

Complete Care for the Caregiver

TCARE® combines evidence-based caregiver support, expert care management, and digital tools to help organizations support a diverse caregiving workforce. From employees supporting aging parents, children in welfare, or individuals with chronic illness, dementia, or intellectual disabilities, our approach blends technology and human connection to **reduce burnout,** improve outcomes, and **boost retention**.

What We Provide:

24/7 Access	Expert Guidance	Community Connection
To tailored digital access resources and suppot tools.	Ongoing support provided by a dedicated specialist.	Access to peer support, webinars, and educational resources.

Results That Matter:

35% improvement
in employee retention among TCARE-engaged staff

50% of engaged caregivers
improve their mental health status & reduce their burden scores

90% caregiver engagement
following initial assessment

Average savings of $8,000
per retained (non-leadership) employee

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www.tcare.ai | hello@tcare.ai

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TSOLife

The Future of Senior Living

TSOLife is the first-of-its-kind AI-driven platform designed to capture resident data and generate actionable insights. From a single interview, communities gain critical information that informs personalized engagement plans, activity calendars, care strategies, and more.

This tech ecosystem is the AI-powered backbone of modern senior living. Built from the ground up, TSOLife's platform equips communities with the data they need to improve outcomes at every level of care.
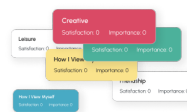
Key Benefits

650%
650% More Data Captured Than Traditional Methods.

Fully Personalized Dashboards For Every Resident.

Three Quality of Life Scales To Assess Residents.

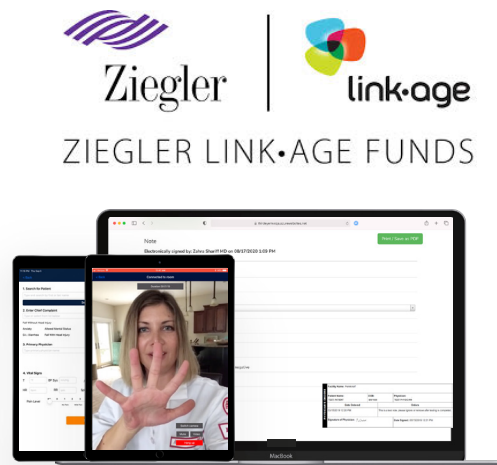**Predictive AI-Powered** Engagement Planning.

Some of Our Trusted Partners

Vitality Living — Be You · Be Vibrant · Belong

BENCHMARK

Acts

SRG SENIOR RESOURCE GROUP

David Sawyer · david.sawyer@tsolife.com · TSOLife.com

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ThirdEye® HEALTH

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Third Eye Health Overview

Third Eye Health is the leading post acute telehealth provider and platform enabling virtual care. Care providers use Third Eye Health's services and platform to conduct virtual care and extend their existing clinical capabilities. Third Eye Health's clinical network of virtual urgent care providers help reduce readmissions and ensure proper care transitions

Coverage
5pm-8am Mondays though Fridays and 24/7 Weekends + Federal Holidays

Performance
Third Eye Health Providers Treat in Place Up to 93% of the Time Helping Reduce Readmissions by 25% on Average

Technology
HIPAA & SOC 2 Compliant Messaging, Image Capture, and Video Calling. Decision support, care coordination system & analytics and reporting platform

Workflow
Simple, Repeatable Workflow for Nurses and Facility Staff

Care Coordination
Care Coordination Nurses Manage Care Transitions and Notifications Between Local Providers and Virtual Providers

EHR Integration
Full Bidirectional EHR Access through API Integrations with PointClickCare®, MatrixCare®, and Others

Ziegler Link-age Funds LP Base:

Concordia Lutheran Ministries

LUTHERAN LIFE COMMUNITIES

Ohio Living
FAITH + COMPASSION + COMMUNITY

ENSIGN SERVICES

The McGregor Foundation

RIVERWOOD GROUP

LIFESPACE COMMUNITIES®

MASONIC VILLAGES
Enjoy Life Your Way

Montgomery Place
skilled nursing by Americare
FIND YOURSELF IN A HAPPIER PLACE®

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VIRTUSENSE™

VirtuSense Technologies

Advancing Proactive Healthcare for All

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Company Overview

VirtuSense was founded by an engineer who wanted to prove that you don't have to wait for a fall or a heart attack to be cared for — predictive AI can make healthcare simple, affordable, and accessible without compromising the quality of care. VirtuSense empowers physicians, care staff, and families to be proactive and patient-centric by using Artificial Intelligence (AI) and sensor technology. **VirtuSense's post-acute solutions focus on detecting and preventing never events**, so that older adults can age in place safely and care teams can focus on active care.

VSTALERT

Up to 80% Reduction of Bedside Falls in Skilled Nursing.

VSTAlert is a resident monitoring platform that supports your team to maintain safety and high-quality care. By using machine vision and AI, VSTAlert provides 24/7 privacy-focused fall monitoring and proactive alerting.

- **95% fewer false alarms** mean fewer disruptions for residents and staff
- **98% detection accuracy** means reliable alerts
- AI monitoring helps stressed teams **fulfill fall protocols without increased rounding or additional staff**

VSTBALANCE

Up to 85% improved mobility for AL/IL residents.

VSTBalance is an automated fall-risk assessment tool that targets long-term fall prevention. The system uses artificial intelligence and machine vision to objectively identify deficits in balance, gait, and function, the three leading indicators of fall-risk, consistently.

- **2-minutes assessments** make routine assessments simple and reports are ready immediately
- **Engaging games** target improvement in Balance, Memory/Logic, Cognitive Function, Endurance, and Flexibility
- **Population health tools** help track your whole resident population

virtusense.ai | info@virtusensetech.com | (855) 443-5744

CONTACT US

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