

# LTC Thought Leadership Series: Moshe Milevsky on the Value of LTC Planning

Professor, fintech entrepreneur, and author



## MOSHE MILEVSKY

Moshe Milevsky is a finance professor at the Schulich School of Business at York University in Toronto. He is also a member of the graduate faculty in the Department of Mathematics and Statistics and Managing Director of PiLECo.



[Watch highlights from Moshe's event series »](#)

For full series video replays, please see next page.

Lincoln continues to lead the industry with a virtual event series featuring keynote speaker, Professor Moshe Milevsky, who was named one of the 35 most influential people in the U.S. financial advisory business during the last 35 years by *Investment Advisor* magazine. He has published 17 books (translated into 6 languages) and over 60 peer-reviewed scholarly papers as well as hundreds of popular articles and blog pieces.

In addition to being an award-winning author, Moshe is a fintech entrepreneur with several U.S. patents and computational innovations in the retirement income space. He is also the recipient of a lifetime achievement award from the Retirement Income Industry Association.

During the series, Moshe sat down with Bill Nash, SVP, Head of *MoneyGuard*® Distribution, and Heather Deichler, SVP, Head of *MoneyGuard* Business Management, to discuss:

- Mitigating portfolio risk using LTC solutions
- Monetizing good health and protect income
- Evaluating LTC features, fees, and services

## Moshe on:

### Why long-term care solutions mitigate risk

"The gap between your health span and life span can be many years. You're going to need help with that and that's where LTC products come into play."

### The tax-efficiency of long-term care solutions

"You've eliminated tax uncertainty and you have tax compound growth – Why not take advantage of a tax advantage if it's there."

### Self-insuring

"When someone says I can self-insure I say, 'well you can self-insure risk but what about taxes – how are you going to do that?'"

### EVENT 1

Mitigate portfolio risk using  
LTC solutions



Uncertainty and volatility are a part of life. Understand how establishing an LTC plan helps clients mitigate potential risks in part 1 of our event series.

### EVENT 2

Monetize good health and  
protect income



The time to plan for LTC is before a care event arises. Learn how clients can monetize their good health in part 2 of our event series.

### EVENT 3

Evaluate LTC features, fees,  
and services



For many, LTC planning is overwhelming. See how you can help clients build an LTC plan that protects their loved ones and financial legacy in part 3 of our event series.

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