



NEXT LEVEL SENIOR ADVISORS

BIG PICTURE VISION FOR 2027



The Following is Our Big Picture Vision for 2027

It is our story of what Next Level Senior Advisors will look, feel, and represent three years from now. As I share this with you, I am deepening my intention and proclaiming this Vision into reality. Join me on this incredible journey so that you can experience the energy that our Team has been creating at Next Level and the impact we make on families, referral sources and senior living communities.

Matt M. Wilson, CSA, CDP
CEO

Visibility + Credibility
= Referability.



Who We Are

Next Level guides families through the overwhelming process of researching, touring, and selecting a senior living community, providing personalized support and leveraging our deep market knowledge to find the perfect fit for their unique situation. We work with local referral sources to assist our patients, clients, and friends to find the ideal Independent Living, Assisted Living, Memory Care, Nursing or home-based service.

Our Culture

Next Level is a team of experienced leaders dedicated to providing personalized support with elevated results to clients and referral partners as they navigate senior living options. As Next Level grows, it is essential to emphasize innovation, collaboration, adaptability, empowerment, and a customer-centric approach. We do this through our core values:

- Exceeding Expectations:** Our client and referral partner expectations are defined as the perceived value we seek from our services. We strive to achieve and exceed those expectations every day.
- Do the Ordinary Extraordinarily Well:** While we may consider what we do as our “everyday”, we provide our services to the best of our abilities.
- Embrace and Drive Change:** We are never complacent when it comes to our growth.
- Keep it Simple:** Next Level strives to make it easy for clients to do business with us.
- Have fun:** We are enjoyable to work with and our team puts a high priority on having fun doing what we love.

How We Are in a League of Our Own

Next Level stands out and is in a league of its own for several compelling reasons:

- Diverse Team:** The team at Next Level comprises professionals from various backgrounds, including nurses, doctors, social workers, CSA’s (Certified Senior Advisor), CDP’s (Certified Dementia Practitioner), outreach liaisons, and relationship builders creating a rich pool of expertise and experience.
- Expertise and Knowledge:** Next Level’s team is highly knowledgeable about the senior care industry. We stay up to date with the latest information in the markets we serve, trends, and best practices to ensure we offer the most accurate and relevant advice to our clients.
- Innovative Solutions:** Next Level embraces innovation and modern technology to streamline the search process to assess and match clients with the most appropriate senior living options.
- Extensive Network:** With extensive experience in the industry, Next Level has developed a vast network.
- Client-Centered Focus:** Next Level places the needs and preferences of our clients at the forefront of our service. We take the time to understand each person’s unique situation and tailor our recommendations accordingly.

These factors collectively place Next Level in a league of its own, earning us a reputation as knowledgeable and highly effective Advisors that stands out among its peers in the industry.

Why We Do What We Do

Next Level is driven by a profound sense of purpose and a genuine desire to make a positive difference in the lives of seniors and their families. Several core motivations underpin **why we do what we do:**

- Passion for Helping Seniors:** Our team has a deep passion for supporting and assisting seniors. We understand the unique challenges and vulnerabilities that seniors face as we age, and we genuinely care about enhancing their quality of life.
- Compassion and Empathy:** Compassion and empathy are at the heart of Next Level’s mission. We recognize that the decision to transition to senior living can be emotionally taxing for both seniors and their families. We ease the burden and foster a sense of comfort during this significant life change.
- Navigating Complex Choices:** The senior care industry can be overwhelming and complex, with numerous options available for seniors. Next Level simplifies this process for families, guiding them through the plethora of choices to find the best fit for each individual’s needs and preferences.
- Trust and Transparency:** Next Level believes in building strong relationships based on trust and transparency. We seek to be reliable partners for seniors and their families, providing honest and unbiased information to empower them to make informed decisions.
- Advocacy for Seniors:** Next Level is an advocate for seniors, ensuring that their rights, dignity, and well-being are respected and upheld throughout the transition process and beyond.
- Making a Positive Impact:** Ultimately, Next Level finds fulfillment in knowing that our work has a positive and lasting impact on seniors and their families. By facilitating a smooth transition to a suitable senior living community, we contribute to a happier, healthier, and more fulfilling life for those 65 years and better.

Never Give Up.



Create a Smile.





Our Clients

Next Level's clients primarily consist of two main groups:

- Seniors:** The first group of clients includes seniors themselves who are seeking assistance with finding the right senior living community. Next Level works closely with these seniors to understand their preferences, budget, geographical preferences, needs and lifestyle requirements, ensuring they are matched with the most appropriate and fulfilling living environment.
- Families and Caregivers:** The second group of clients consists of families and caregivers of seniors. As seniors age, their family members or caregivers often become involved in the decision-making process regarding their living arrangements. Next Level recognizes the importance of including families in this process and provides them with guidance, support, and expert advice.



Make an Impact.



The Habits Today will Shape who you Become Tomorrow.



Intentions Don't Determine Direction Your Habits Determine Your Direction.



We Are Changing The World Together

Next Level makes a positive impact and contributing to changing the world in several significant ways:

- Rooted in Placement:** This initiative aims to make a positive environmental impact through honoring the seniors we directly serve. By partnering with One Tree Planted, Next Level donates toward the planting of five trees for every elder we successfully place in a senior living community.
- Enhancing Senior Care:** By providing personalized guidance and support to seniors and their families, Next Level helps ensure that seniors receive the care and living arrangements they deserve. This contributes to an improved quality of life for seniors, fostering a sense of dignity, comfort, and happiness during their golden years.
- Empowering Families:** Next Level's services ease the burden and stress on families and caregivers who are involved in the decision-making process. By offering insight and advice, Next Level empowers families to make informed choices that align with their loved one's best interests.
- Raising Awareness:** Next Level's work raises awareness about the importance of senior care and the challenges faced by seniors and their families. We help shed light on the need for improved senior care services, which can lead to broader societal discussions and initiatives to support seniors.
- Promoting Compassionate Senior Care:** Next Level's compassionate approach to senior care serves as a model for other organizations in the industry. Our emphasis on empathy and understanding sets a standard for how seniors and their families should be treated during the often emotional and challenging process of transitioning to senior living.
- Strengthening Senior Communities:** By connecting seniors with senior living communities, Next Level contributes to their occupancy and financial performance. These communities provide opportunities for social engagement, activities, and companionship, promoting a sense of belonging and purpose.



While Next Level's impact may be more localized by the markets we serve, our dedication to helping families and making a positive difference in the lives of seniors and families demonstrates how even small actions can contribute to meaningful change in the world of senior care.



Goals

These specific goals help guides Next Level's growth strategy and provide measurable targets to track progress and success:

- › **Team:** We are in 30 cities across the United States.
- › **Advisors:** Next Level has over 40 Advisors helping families.
- › **Placements:** Our monthly placements continue to climb resulting in 150 placements per month.
- › **Planting Trees:** Next Level has planted over 10,000 trees through our Rooted in Placement initiative.
- › **Followers:** Next Level has over 15,000 followers on social media via LinkedIn and Facebook and continues to grow.
- › **Advisor Satisfaction:** Advisor satisfaction is extremely high with an Advisor turnover rate of less than 4%.
- › **Client Satisfaction:** Next Level scores exceptionally high on client satisfaction through online surveys.
- › **Response Time:** Our Advisor's average inquiry response time is less than 7 minutes.

These goals have helped Next Level stay focused, measure progress, and drive success during Next Level's growth.



The Key to Success is to Focus on Goals, not Obstacles.



Why Founder, Matt Wilson, Does What He Does

- 1. Personal Experience:** With over two decades in senior housing, I have firsthand experiences helping families seek senior living, and witnessing the challenges faced by seniors and their families. These experiences inspired me to create a company that offers better guidance and insight during the transition to senior living.
- 2. Identifying a Gap in the Market:** I recognized a gap in the senior care industry to help families.
- 3. Entrepreneurial Spirit:** I have an entrepreneurial spirit and desired to build something impactful from the ground up.
- 4. Passion for Helping Others:** I have a genuine passion for helping others and am motivated by a desire to make a positive difference and improve the lives of seniors and their families.

My passion fuels us every single day to provide our Advisors with the appropriate tools to help referral sources and families. This energizes me to continuously pursue personal growth and elevate Next Level to new heights. I continually aim to step further into my own leadership so I can truly be a leader for our team.



Next Level's Growth Story is Written one Accomplishment at a time.



My Focus

As the CEO, I have shifted into the role of innovator, strategist, and relationship builder. My time is divided between creating new innovations and content for our Advisors, growing the brand, cultivating important relationships to further our business growth, and quality time to interact with our phenomenal Team.



Media Visibility

Next Level has been consistently featured in AARP, Senior Living Executive, 55+ Magazine, Caring Times, Eldercare Advisor, Today's Senior Magazine, Readers Digest, and Prevention magazines. In addition, Matt has appeared as a guest speaker on the Today Show, CNBC, and several blogs and podcasts. The book *Guiding Families* continues to sell copies nationwide, attracting families and referral sources to utilize Next Level services.



A Company's Vision is the Guiding Star that Leads it to Greatness.



Partnerships

We continue to establish win/win Partnerships with local referrals sources. Next Level has formed successful partnerships with organizations such as local healthcare systems and hospitals, AARP, Parkinsons Associations, American Society on Aging (ASA), LeadingAge, and Alzheimer's Association.



Awards

Next Level has been awarded:

- > Senior Advocate Awards
- > Top Workplace Awards
- > Local Business of the Year
- > Senior Advocate Awards
- > Customer Service Excellence Awards
- > Innovation Awards
- > and Veterans Care Partner Awards

