

Law Firm Files Suit Over National Healthcare Trust Investments on Behalf of Retiree Seeking Significant Damages

Firm alleges negligence, unsuitable recommendations, and disclosure among other failures involving National Healthcare Trust non traded securities product.

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Haselkorn & Thibaut, P.A.

([InvestmentFraudLawyers.com](https://www.investmentfraudlawyers.com))

announced today the filing of a private civil arbitration claim against Osaic Institutions, Inc. on behalf of an elderly retiree in her mid to late seventies who alleges financial harm tied to investments in instruments associated with [National Healthcare Trust](#) non-traded securities. The claim (Case No. 25 02056), filed on September 26, 2025, seeks damages and raises significant concerns about suitability, disclosure, and the negligent and improper handling of non traded securities investments in National Healthcare Trust by the firm.

The claim alleges the retiree was recommended or otherwise invested in non traded securities linked to the

National Healthcare Trust without a sufficient disclosure and explanation of the risks and features of the investment product including but not limited to limited liquidity, valuation uncertainties, lack of transparency, potential loss of principal, and other material terms. The lack of fair and balanced presentations of the risks are an important issue when it comes to the sales



National Healthcare Trust



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of these complex, illiquid, alternative investments. Haselkorn & Thibaut contends that these alleged shortcomings contributed to a measurable loss for the retiree, who relies on retirement assets to provide financial security and help them meet living expenses in their golden years.

Quote from counsel

“We brought this action to protect a retiree whose financial security was put at risk by complex, illiquid, alternative investments in National Healthcare Trust,” said Matthew Thibaut, Partner at Haselkorn & Thibaut. “Non traded securities connected such as National Healthcare Trust often involve limited secondary markets, a lack of transparency, and complex structural features that increase risk for investors who may not completely understand what they are purchasing, how the investment product is designed such that it may make or lose value, and may not be in line with their investment objective or risk tolerance. Our law firm is committed to holding firms and financial advisors accountable and securing relief for investors, particularly in cases involving vulnerable seniors.”

National Healthcare Trust Non-Traded Securities are central to the claims

The National Healthcare Trust is central to the allegations because the investment product at issue has a limited market (if any), and is defined by securities regulators as a complex product. The claim alleges that the retiree was not adequately informed about how National Healthcare Trust non-traded securities are priced, redeemed, or how or when there could be liquidity. Given the retiree’s age and reliance on investments as a supplemental source of , the recommendation of an illiquid, non-transparent, complex, alternative investment product as well as alleged failure to properly disclose material risks and other characteristics in the requisite fair and balanced manner is a major focus of the claim.

Key allegations (summary)

- Recommendations of complex, alternative investment products such as National Healthcare Trust were negligently made and likely unsuitable for an elderly, retired client.
- Failure to disclose material terms, illiquidity risks, and other material risk factors associated with National Healthcare Trust instruments in a fair and balanced manner as required by the applicable law, rules and regulations.
- Conduct that resulted in a material financial loss for which the claim seeks damages.

Broader significance for retirees and investor protection

Non tradeable and illiquid securities as well as similar complex and alternative investment products (including, but not limited to) National Healthcare Trust present unique risks for older investors especially those who may be at or near retirement, or those who cannot replace loss of

principal. Seniors and retirees often have reduced time horizons to reach investment objectives, recover losses, and limited risk tolerance for market loss or volatility, and a greater need for their principal to remain intact so as to provide liquidity to fund living and health care expenses.

The issues raised in the pending claim underscore some broader issues. Among other issues there is the public interest in ensuring financial institutions recommending and selling complex alternative investment products adhere to all applicable laws, rules, and regulations, including (but not limited to) proper (fair and balanced) disclosures, suitability, risk tolerance, etc.—particularly when recommending non-traditional investment products to those who might be at or nearing retirement, or who may otherwise be older or more vulnerable investors. Haselkorn & Thibaut's filing seeks not only to obtain redress for the individual client(s) but also to encourage securities industry practices that better protect older investors from unsuitable or otherwise improper recommendations of non-traded securities and other complex alternative investment products, such as National Healthcare Trust.

Plaintiff profile (privacy preserved)

The plaintiff or claimant is described in the allegations as a retiree in her mid to late seventies who relies on investment income to support her daily living expenses. At the client's request and to preserve privacy, the firm is not identifying the retiree by name in this release.

Legal process and next steps

Following the September 26, 2025 filing of FINRA Case No. 25 02056, the defendant or respondent firm may respond with motions or an answer. Haselkorn & Thibaut expects to engage in discovery, consult experts regarding the characteristics and risks of a complex alternative investment such as National Healthcare Trust non-traded securities, and pursue all available remedies. The firm will evaluate settlement opportunities that could be in the client's best interest (if they arise) but is otherwise prepared to and looking forward to the opportunity litigate vigorously and zealously advocate for their client in order to achieve the best possible outcome.

Call to action for affected investors

Investors who believe they may have losses tied to complex, illiquid, non-traded and non-traditional alternative investment products similar to the non-traded REIT investments in National Healthcare Trust or who have questions about suitability, disclosures, or other related issues may contact Haselkorn & Thibaut for a free consultation. Investors can call toll free at 1 888 885 7162 or visit the [firm's website at investmentfraudlawyers.com](https://www.investmentfraudlawyers.com) to request a consultation and obtain additional information about the filing and related matters.

Media contact / further information

For media inquiries, requests for copies of publicly filed documents, or additional information, please contact Haselkorn & Thibaut's press office. To schedule a free consultation regarding potential losses involving the National Healthcare Trust, investors may call 1 888 885 7162 or visit investmentfraudlawyers.com.

About Haselkorn & Thibaut

Haselkorn & Thibaut represents investors and consumers in securities, fiduciary duty, and consumer protection matters. The firm pursues remedies on behalf of clients who allege financial harm due to misconduct, misrepresentation, negligence, or failures in the handling of investment products, including non traded securities and other complex or alternative investment products such as the National Healthcare Trust REIT investment. The firm focuses on holding financial institutions accountable for any negligence or impropriety and obtaining the optimum results for their investor clients.

Standard legal disclaimer

These statements summarize allegations contained in a civil pending arbitration claim and are not proven nor do they (at this juncture) include any Award or findings of liability or damages. Osaic Institutions, Inc. is contesting the claims and presenting defenses.

The sole purpose of this press release is to provide an example of how securities broker-dealer firms are facing claims for loss or damages based on the sales of complex alternative investment products and to investigate how various firms, including FINRA broker-dealer firms and Registered Investment Advisory firms, have researched, marketed, sold, monitored, and supervised non-traded securities products such as National Healthcare Trust and made the recommendations and sales to retail investor clients and how they advised, recommended, and implemented such investment strategies that included these or similar investment products. If you are a retail investor with information related to these topics, please contact our office.

Matthew Thibaut
Haselkorn & Thibaut, P.A.
+1 888-885-7162
[email us here](#)

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