

What's happening...

# SRES



## THIS WEEK:

### “INNOVATIVE SETTLEMENTS”

**Life Settlements  
w/Carole Sue Fiedler**

...the pioneering original and independent  
Life Settlement consultant and broker...  
**CASH VALUE SENIORS CAN CONSIDER AND  
UTILIZE WHEN THE NEED ARISES**

“80% of all life insurance policies lapse?  
Premiums become too expensive.  
Needs change, policies don't renew. All  
premiums paid are lost.  
Now there is a way to get cash for  
unwanted policies!”



415-925-1175

Licensed Life Settlement Specialist

### SENIORS REAL ESTATE SPECIALIST®

SRES® CAR®/NAR® Designation

**\*Senior Homeowners and families  
of Senior Homeowners\***

“Preservation, Protection and Guidance of the  
families Real Estate Asset(s)”

...this is an evolving demographic, and our  
services will evolve as well...

### NEXT WEEK:



Thomas Drapala

National Association of  
Registered Social  
Security Analysts

### UPCOMING PRESENTATIONS:

August 12 – VA Benefits

August 19 – Age Friendly w/Annabell  
Phelan

August 26 – Shawna Rodriguez  
Bay Area Care Management  
Seniors Advocacy

September 2 – Agent Personal Safety  
“Damsel in Defense”

September 9 – Meals on Wheels

September 16 – The Humane Society

September 23 – Bitwise, Asset  
Management

September 30 – “House Rich, Cash Poor”

October 7 – Digital Inclusion, Sourcewise

October 14 – 211-UnitedWayBayArea  
Clare Margason

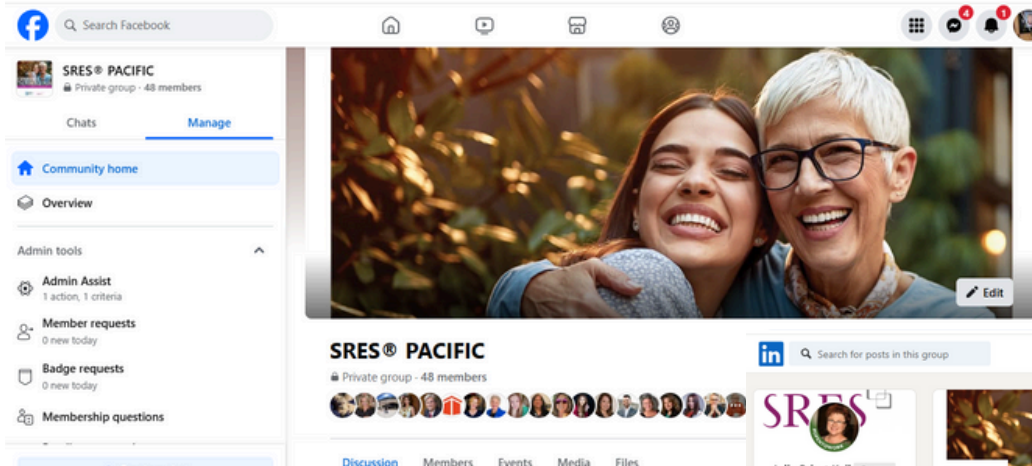
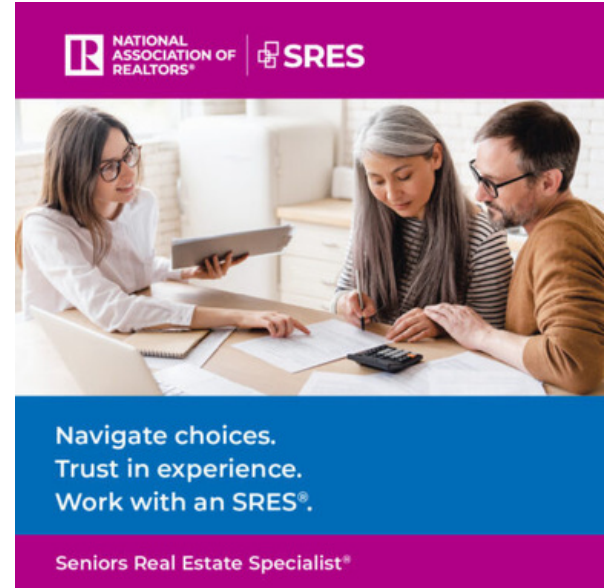
# What did you do SRES® this week?

## SRES.REALTOR LINK



Have you been to the NEW IMPROVED SRES® Member Portal?

Lots of education and marketing resources for co-branding your own marketing.



## FACEBOOK AND LINKEDIN

### Group Pages!

## SRES®PACIFIC

Go to the group pages and join in...

POST YOUR SRES ACTIVITIES ON THE GROUP PAGES,  
INTRODUCE YOURSELF! THIS IS NETWORKING...

Let me know what content you would like to see...JPK

Thank You

...to our SRES®Colleagues who've already joined in!



Thank You !



## "PROTECTING YOUR NEST EGG"

**Silvana Quintanilla**

Senior Enforcement Counsel, Public Finance Abuse Unit

**Brienne Dickman**

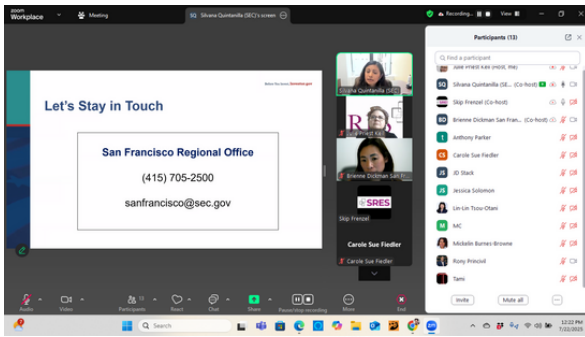
Securities Compliance Examiner



U.S. Securities and Exchange Commission  
44 Montgomery Street, Suite 700,  
San Francisco CA 94104 Ph. 415.705.2451

[sec.gov](https://sec.gov)

[LINK to last week's SRES@NWMG recording](#)



Are you a Caregiver to a family member? Get this book ASAP!

"The Invisible Patient" Annalee Kruger

Careright, Inc

<https://carerightinc.com/>

Order  
here



## BOOK CLUB

Doing now on Audible:

"The Millionaire

Real Estate Agent"

Gary Keller & Jay Papasan

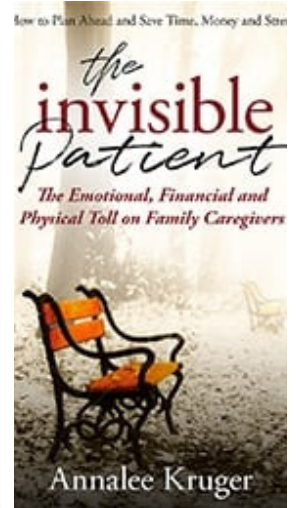
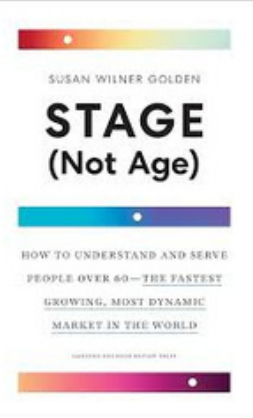
"Stage (Not Age)"

Susan Wilner Golden

audible



amazon



**\*Lead Gen\* Prospecting + Engagement + Conversion  
= Listings and Closings!\***

What shall we do this week? What shall we do every day?

Got ideas? Bring them!

**Julie Priest Keil - Senior Home Coach®**  
**Seniors Real Estate Specialist® & Services**

DRE#01917489 Certified Senior Advisor® - REALTOR®

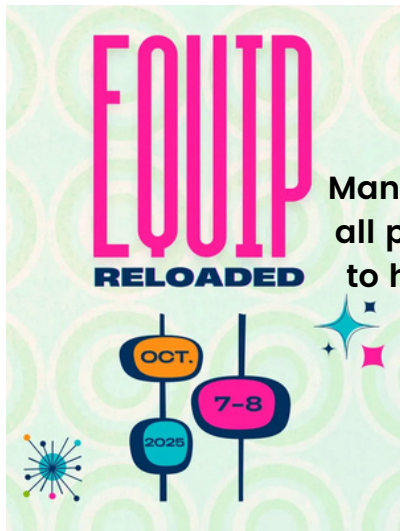
408 529 1482

[jpkeilrealtor@gmail.com](mailto:jpkeilrealtor@gmail.com)



[sunstoneseniors.com](https://sunstoneseniors.com) LINK

Brokered by BRG REALTY CORP DRE#02075330 [BRG REALTY LINK](#)



# EQUIP RELOADED CONFERENCE

Presented by Senior Home Coach™

Designed for senior niche real estate professionals, Senior Move Managers®, Referral & Placement Advisors; Aging in Place Specialists and all professionals dedicated to addressing Aging Issues especially related to housing choices, transitional moves and quality of daily life at home.

10/7 - 10/8 - Full Day sessions

10/10 - Podcast Camp - limited space available

Date: October 7th - 8th

Location: Wichita, KS

Senior Home Coach EQUIP LINK



**SENIOR**  
HOME COACH™



The Senior Call Register  
ZOOM LINK

## "THE SENIOR CALL"

**\*MEMBERSHIP ON THE MIGHTY NETWORK\***

Senior Home Coach Mighty Network

Membership LINK

Follow the QR Code BELOW to register on ZOOM and join us, MONDAY TO FRIDAY

6am PACIFIC TIME. YES, that's so early for us ;- ) however...

Plenty of time to attend before the SRES®NWMG at 1130am PT on Tuesdays!

EMPOWEREDSENIOR.ORG LINK

## DAILY MASTERMIND CALL: "THE SENIOR CALL"

**FREE!**

Energizing YOUR 2025  
Senior-Based business!

Weekdays 6AM PT

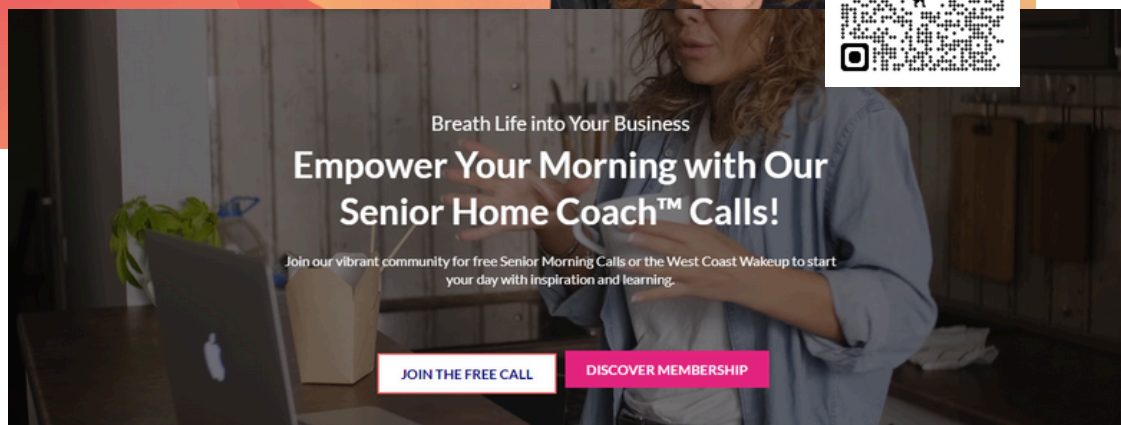
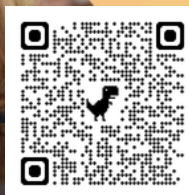
Join the daily mastermind call with

**KATHERINE AMBROSE**

*America's Senior Home Coach™*



**FREE**



Breathe Life into Your Business

**Empower Your Morning with Our  
Senior Home Coach™ Calls!**

Join our vibrant community for free Senior Morning Calls or the West Coast Wakeup to start your day with inspiration and learning.

[JOIN THE FREE CALL](#)

[DISCOVER MEMBERSHIP](#)

SHC Membership Benefits:  
Join Our Founding Members Inside  
The Academy

