

Bulletin

Next MeetUp:
Tuesday, June 10

June 9, 2025

11:30AM ZOOM & SVBC

1900 Camden Ave San Jose 95124

“STAY – SELL – BUY”

*Remodel to Stay

*Remodel to Sell

*Buy & Remodel

*BUY/SELL/OPERATE

SENIOR & COLIVING BIZs

AND *RE RAL Development

What's happening...

SRES



THIS WEEK:

John Bacigalupi

721 Exchanges & UPREITs

“721 or UPREIT DST programs have gained significant traction in past few years as more potential investors learn about the benefits of the legislation. John will discuss the both the positive and negative ramifications of using a 721 or UPREIT DSTs.”

SVP – Regional Director & National

Private Markets Specialist

Cantor Fitzgerald Asset Management

(mobile) 650-703-7180

(text only) 650-935-4373



CANTOR.COM LINK

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:

CURTIS PETERSON

NATIONAL SALES DIRECTOR

CERTIFIED SENIOR ADVISORS®

–HISTORY
–CSA
–COMPASS



CompassPlus

UPCOMING PRESENTATIONS:

JUNE 24 – DAVID BUTLER, HECMs

July 1 – ON LOK, Senior Services
San Jose

July 8 – Real Estate Advocate Alliance .org

July 15 – Televisit, Wesley Cheng;
KNOXBOX.COM

July 22 – “Protecting your NestEgg”

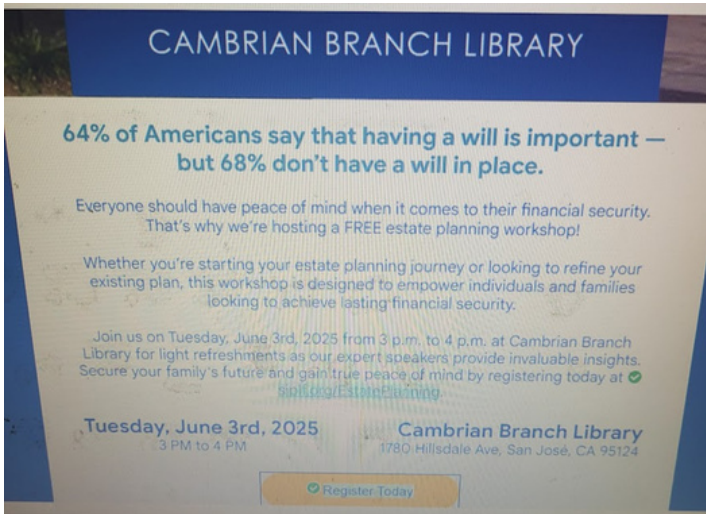
July 29 – Life Settlements
w/Carole Sue Fiedler

August 5 – Social Security

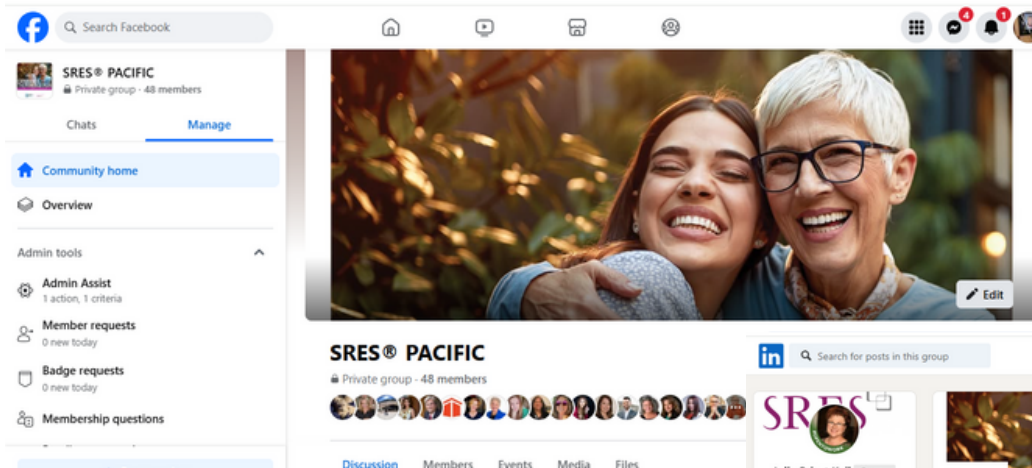
August 12 – VA Benefits

Thank you for your participation SRES! I'm grateful for our collaboration – JPK

What did you do SRES® this week?



Thank you to Valerie Brower, our SRES® colleague for the heads-up and invite to attend this consumer-facing Estate Planning Seminar at our local library. An excellent opportunity to view the process, gauge the audience and meet the presenters, give them our information and plans for networking... look for these opportunities in your market!



FACEBOOK AND LINKEDIN

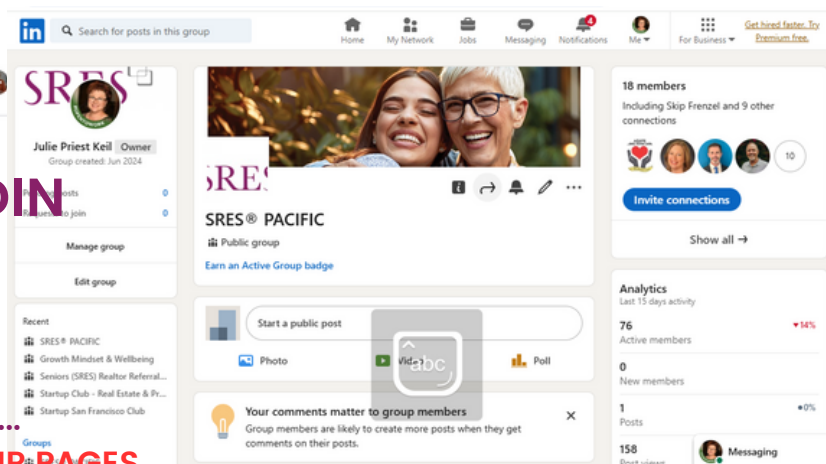
Group Pages!

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 ! ANDREW LEKASHMAN AI IN REAL ESTATE & SRES®



Andrew Lekashman LINK

Andrew on LINKEDIN LINK



What is the Silicon Valley Senior Roundtable?
<https://seriousaging.com/silicon-valley-senior-roundtable/>

[LINK to LAST WEEK'S RECORDING WITH ANDREW](#)



BOOK CLUB

Doing now on Audible:

**"The Millionaire
Real Estate Agent"**

Gary Keller & Jay Papasan

"The Eldercare Planner"

Joy Loveride

Are you a Caregiver to
a family member?

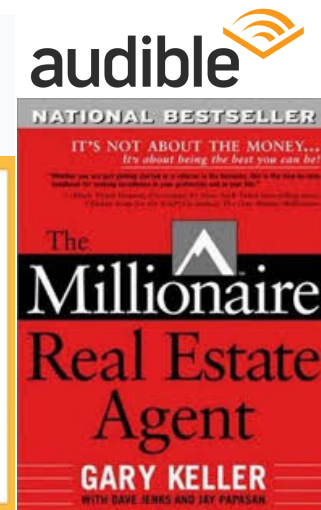
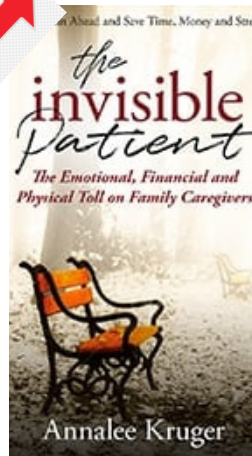
"The Invisible Patient"

Annalee Kruger



Order here

Go get this book
ASAP!



***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

Certified Senior Advisor® - REALTOR®

DRE#01917489 408 529 1482

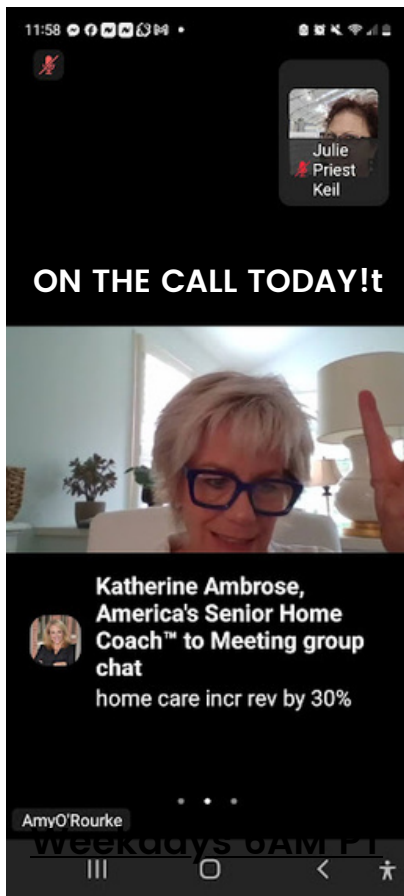
jpkeilrealtor@gmail.com



sunstoneseniors.com LINK

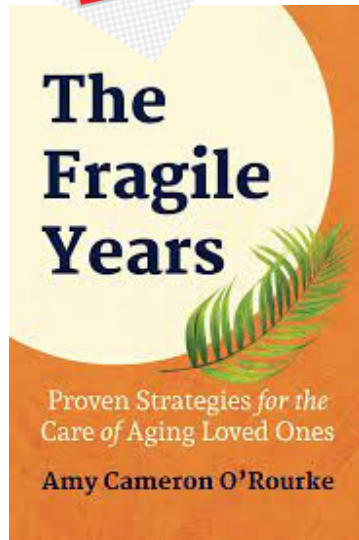


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Senior Home Coach®

The Senior Home Coach Academy LINK



FREE!

"THE SENIOR CALL"

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!

DAILY MASTERMIND CALL: SENIOR HOME COACH

Energizing YOUR 2025
Senior-Based business!

EMPOWEREDSENIOR.ORG LINK

Join the daily mastermind call with
KATHERINE AMBROSE
America's Senior Home Coach™



Thank You



SHC Membership Benefits:
Join Our Founding Members Inside
The Academy