

What's happening...

SRES



THIS WEEK:

“Understanding & Optimizing Social Security Benefits for Your Clients”

“Social Security can be a confusing and complex topic for many clients. It is a valuable topic that every client should know more about to ensure they understand their claiming options, Social Security pitfalls, and rules that impact on their specific circumstances. Join us for this webinar to learn more about Social Security, including the basics, complexities, and examples of how clients are impacted by the pitfalls they are usually unaware of.”

SRES®-this directly impacts the real estate financial health of our senior homeowner clients.

Thomas Drapala

Director, Strategic Partnerships
National Association of Registered
Social Security Analysts
RSSA.com | NARSSA.org |
631-672-8399



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:

Jim Blythe, The Veterans Administration

VA



U.S. Department
of Veterans Affairs

UPCOMING PRESENTATIONS:

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

October 21 – Older Americans Act/Sourcewise

What did you do SRES® this week?

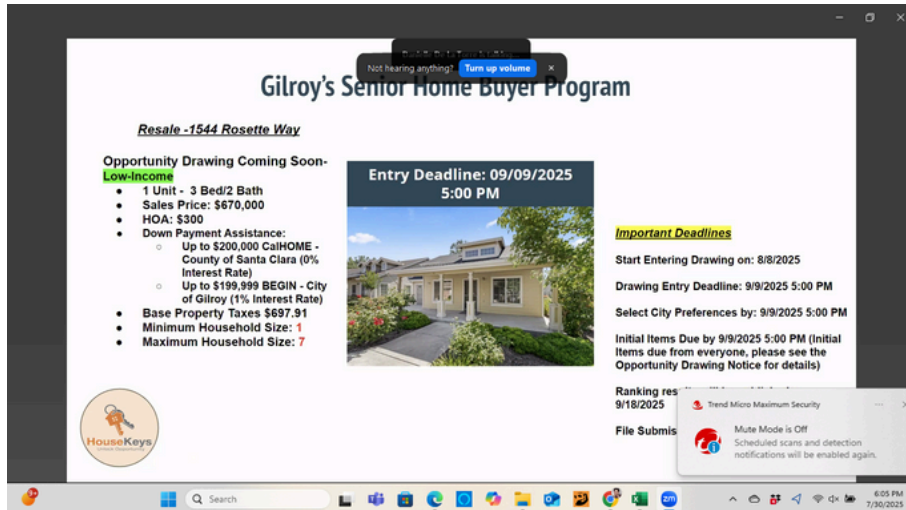


HouseKeys
Unlock Opportunity



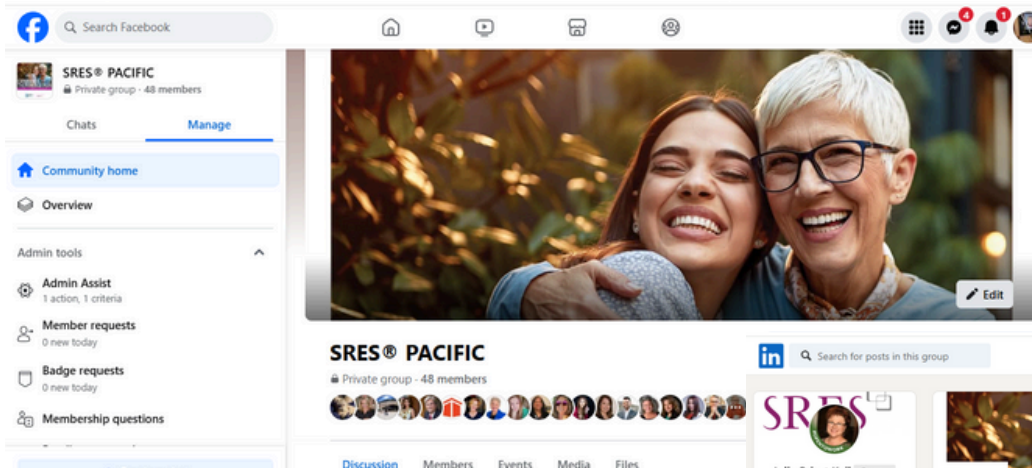
HOUSEKEYS.ORG LINK

Real Estate Agent Partnership Program
<https://www.housekeys.org/reagentpartner>



There are multiple Bay Area towns and cities that have the HouseKeys program available for affordable housing, purchase and rental.

**Affordable Senior Housing
GO ONTO THE WEBSITE TO
LEARN MORE –
EARN REFERRAL FEES TOO!**



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!

Carole Sue Rescheduled!
for December – got a client that
could use a “life settlement”?

Call her now.

415-925-1175

Licensed Life Settlement Specialist



“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!”



BOOK CLUB

ARE YOU A CAREGIVER
OR DO YOU HAVE A
CAREGIVER IN YOUR
FAMILY?

“The Invisible Patient” Annalee Kruger

Careright, Inc

<https://carerightinc.com/>

Order
here



Doing now on Audible:

“LONGEVITY BLUEPRINT”

Karina Loyo PHD

<https://longevityblueprint.org/>

“Stage (Not Age)”

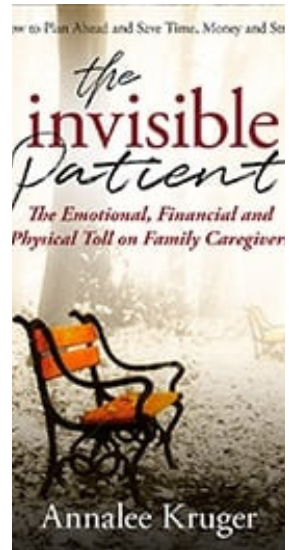
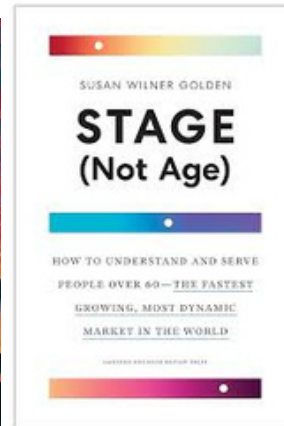
Susan Wilner Golden

<https://stagenotage.com/>

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®

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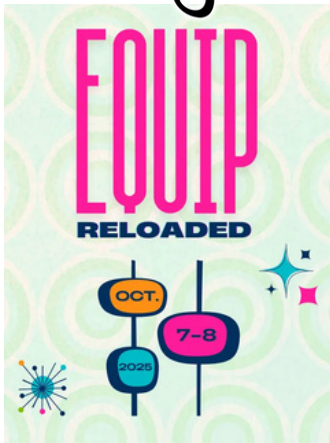
sunstoneseniors.com LINK



Brokered by BRG REALTY CORP DRE#02075330 BRG REALTY LINK

Thank You

KATHERINE AMBROSE JUMPING IN LAST WEEK! SRES®NWMG
ICYMI LINK TO LAST WEEK RECORDING SRES®NWMG



EQUIP RELOADED CONFERENCE

Presented by Senior Home Coach™

Designed for Seniors Real Estate Specialists®,
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.

Date: October 6th* - 9th* 2025

Location: Wichita, KS



Senior Home Coach EQUIP LINK

The Senior Call Register ZOOM LINK

"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!

MEMBERSHIP ON THE MIGHTY NETWORK
Senior Home Coach Mighty Network
Membership LINK

DAILY MASTERMIND CALL:
"THE SENIOR CALL"

FREE!

Energizing YOUR 2025

Senior-Based business!

Weekdays 6AM PT

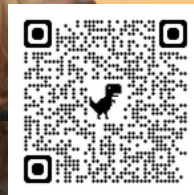
Join the daily mastermind call with

KATHERINE AMBROSE

America's Senior Home Coach™



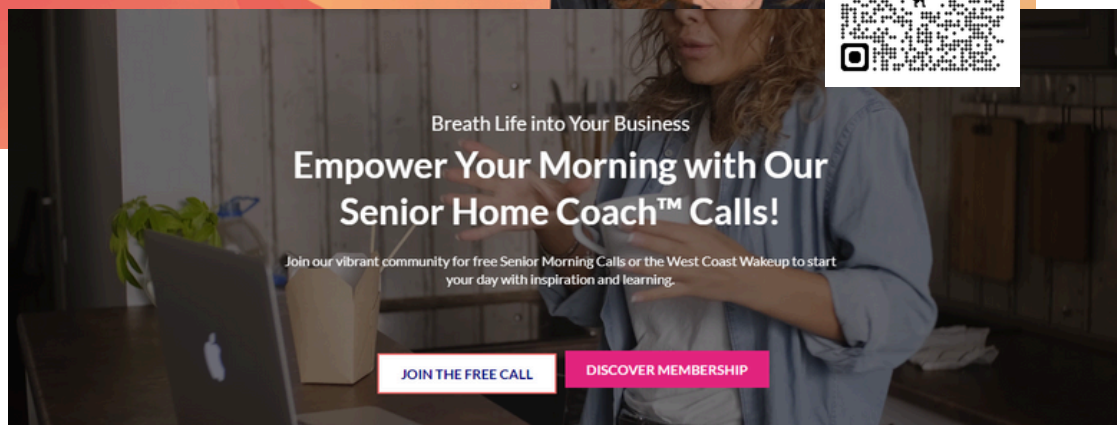
FREE



EMPOWEREDSENIOR.ORG LINK



Thank You



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

