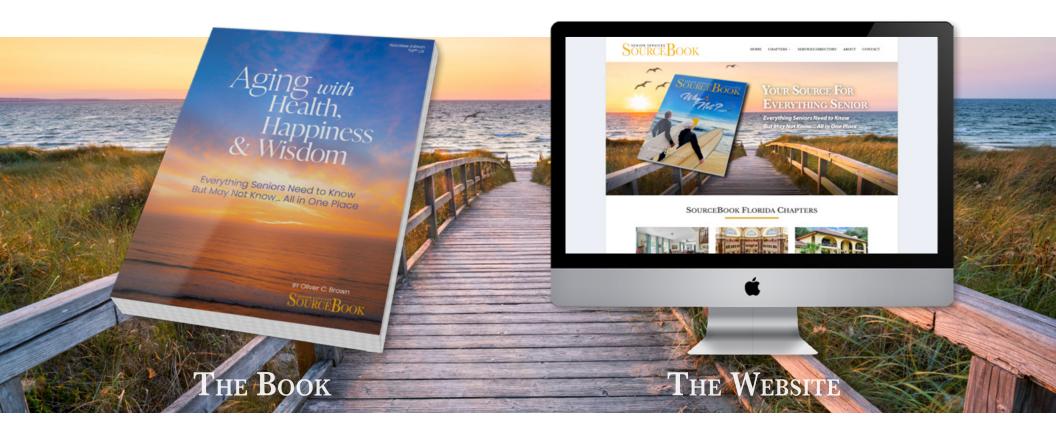
SOURCE BOOK

2025



Everything Seniors Need to Know But May Not Know... All in One Place

ABOUT THE SOURCEBOOK

DIFFERENT... & Unprecedented



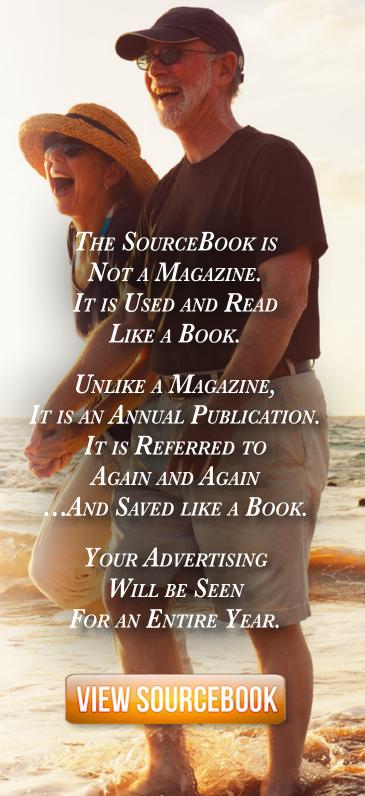
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Pages

Chapters

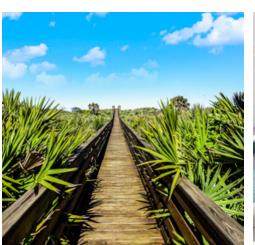
Senior Topics

Photos & Illustrations











SOURCEBOOK READERS

TARGETED



Mailed Directly to the Homes of 30,000 Affluent Seniors



100% of Readers are Seniors in St. John's County

100% of Readers have a Net Worth over \$1,000,000

VIEW SOURCEBOOK

Source Book

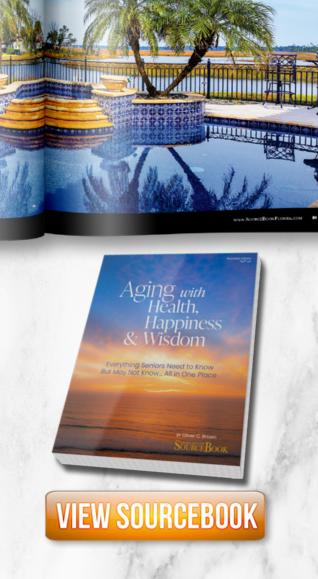
A Look Inside The Book



EXCEPTIONAL

ht my eye. Just like the Unique

Pools



A LOOK INSIDE



CHAPTER 🖊

72 THE SOURCE BOOK

WHAT YOU SHOULD CONSIDER Estate Inventory: Start by creating a comprehensive inventory of all assets and liabilities, including real estate, personal property, bank accounts, stocks, bonds. estate, personal property and any other assets. This can also be newment economic was any other assets. This coin asset is used for insurance purposes in case of hurricase or fire.

Goels and Objectives: Identify the goals and objective you want to achieve through estate planning, including you want to acrove prough enters practing increasing ensuring the financial security of loved ones, minimizing taxes and other expenses, and supporting charitable

Beneficiaries: Decide who you want to receive your determinants: Liectice who you want to receive your assets and in what proportions. This will help you determine who should receive your assets in the eve

Estate Texes: Estate taxes can significantly reduce value of your estate, so it's important to consider i to minimize their impact.

Will A Will is a legally binding document that ou Will. A Will is a legally brinding document that our how your assets will be distributed after your dear Condider having a will prepared by an articrary it it is properly executed and meets all legal requir

184 THE SOURCE BOOK



ses with the long, long driveways to have a

ew years ago, I was having coffee with my friend — at the things that self! Prescription medicines, open or Lalmost asked her. "Who for?" but that _____ need special handling or permits depending upon the rude. Don't get me wrong, she and her age. But again, let the professionals handle it. They're Don't worry about "tidying the place up". That is just part of what an estate sale company does. And it's

 $W_{
m EALTH}$ MANAGEMEN approach to managing financial assets and investments, with the goal of helping hiduals or families achieve their financial goals. while professional Wealth Management may not be appropriate for your financial situation, thoughtful

CHAPTER 6

financial planning is important for all retirees. Whether or not you choose to engage the services of a professional Wealth Manager you

essential to balance your portfolio between risky and safe assets to match your risk tolerance.

Ensuring Lifestyle Sustainability: Many retirees want to maintain the same Elestyle they had during their working years. A well-planned wealth management strategy can

Healthcare Costs: Healthcare costs are a significant concern for retirees, and they tend to increase as one gets older. Proper wealth management can ensure that you are prepared for increased medical expenses or long-term care needs.

Inflation: Inflation reduces purchasing power over time. Effective wealth management considers the impact of inflation to maintain the real value of your

Estate Planning: Many retirees want to leave a legacy or provide for their heirs. Wealth management can include estate planning components to ensure the

Tax Planning: In netirement, your income may be lower. taxes can still take a significant bite out of your davings. A wealth manager can help minimize tax impacts

Longevity Risk: People are living longer these days, means retirement savings need to last longer. per wealth management helps ensure that retirees



BUYING YOUR RETIREMENT HOME

Hunting for Your Dream House

ou've raised a family and your kids have flown the nest. Now it is your time. You know that somewhere out there, the retirement home of your dreams is calling you. But how do you go about finding it?

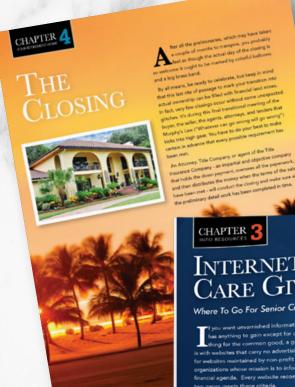
While we all know how to comparison shop to get the best buy on a stereo or car, houses or condos seem much harder to find, especially when you realize that buying a place to live is probably going to be the last big purchase you'll make in your lifetime.

But concern doesn't have to be part of the process. Getting the best value for your money in the housing market isn't all that difficult; it's just a matter of knowing how to go about it. This chapter will show

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VIEW SOURCEBOOK

A LOOK INSIDE





VETERANS SERVICES

Many Veterans Don't Optimize Their Benefits



paid out a record \$163 billion in earned benefits to

There are two primary reasons why Veterans don't know their benefits: (1) the vast majority of veterans not stilize the VA Healthcare System, so they have



fou're fine, the leg is OK, but the pain is about

Trip duration: Consider the length of your trip when purchasing travel insurance. Some policies have limits on

Hination: Some policies may have exclusions or

Claims process: Find out what the process is for making claim under your travel insurance policy, and make sure

covered and what isn't. If you travel frequently or ind extended time abroad, you might want to consider onal insurance specifically designed for traveler

INTERNET HEALTHCARE AND CARE GIVER RESOURCES

Where To Go For Senior Care Information

If you want unvarnished information, where nobody has anything to gain except for doing the right ning for the common good, a good place to start is with websites that carry no advertising. Then, look for websites maintained by non-profit or governmental organizations whose mission is to inform without bias or a . • Medical dictionary and en financial agenda. Every website recommended on these • Interactive health tuter two pages meets these criteria.

Your first stop for health information on the Internet should be www.MedlinePlus.gov. It is from the National Library of Medicine, and it is free. This website will always give you good and accurate facts. Medline Plus rmation is reliable, current, written by professionals

Medline Plus is very comprehensive and feature

The Medline Plus Sen medineplus.gov/olderadults.html) has answers to



OTHER REPUTABLE WEBSITES AND IMPORTANT SENIOR TOPICS

Topics addressed by the following 17 websites include Caregiving and Older Adults, Insurance, Medicine & Payment Help, and Advance Care Planning. Each one of these websites has been recommended by two or more unbiased Senior Care Professionals



Caregiving and Older Adults

- National Alliance for Caregiving (www.caregiving.org) offers research, support groups, and resources for all
- * Long-Term Care Information (www.longtermcare.gov) provides facts and tips about planning long-term care
- Eldercare Locator (www.eldercare.gov) offers Information about senior services.
- * VA Caregiver Support (now caregiver va.gov) gives a support line (855-260-3274)
- * National Institute on Aging (www.cia.hih.gov) Leads a broad scientific effort to understand the nature of 19ing and methods to extend the healthy, active years of life. NA is the primary federal agency supporting and
- Information on Alpheimer's disease and dementia 19thptoms, diagnosis, stages, treatment, care and Support resources. See pages 124-127 for more

 Pillbox (www.pillbox.nlm.nih.gox) provides facts about pills, pictures of each pill and side effects.

Healthcare.gov (axxxx healthcare.gov) helps you find

Veterans Affairs (www.xa.goodhealth) details Veterans

health benefits, health programs and locations of VA

. Benefits.gov (www.benefits.gov) gives facts on all

Insurance options and make choices

types of government benefits

Medicine & Payment Help

- Consumer Med Safety (www.consumermedsafety.org) offers tips for taking medicines safely including storing. discarding, and poisoning.
- Needy Meds (www.needymeds.org) details free or low-cost medicine payment programs (800-503-6897).
- · RxAssist (www.rxassist.org/patients) explores payment help with medicines and give links to free or low-cost

Advance Care Planning

Healthcare planning for the future is an important step to make sure that you will get the medical care that you want. These websites will provide the information you will

- information specific to caregiving of veterans, including . National Institute on Aging (www.nia.nih.gov/health publication/advance-care-planning) provides tips and help for advance directives, how to select someone to help you make health decisions, and more.
 - Caring Connections (mnw.caringinfo.org) gives information and support for planning ahead and includes links for advance directives for all states. •

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SOURCEBOOK PUBLICATION SCHEDULE

MAILED TO 30,000 SENIORS THIS YEAR

2025 Publication Schedule

The SourceBook is an Annual Publication
In 2025 there will be Three Editions serving Three Unique Markets
Each Edition will be Virtually Identical to the Present Edition

Spring 2025 – Ponte Vedra Beach Edition

Mailed to 10,600 Seniors*

*Every Senior in Ponte Vedra Beach with Net Worth over \$1,000,000

Late Summer 2025 – Southeastern St. Johns County Edition

(St. Augustine & Anastasia)

10,000 Seniors whose Net Worth is over \$1,000,000

Late Summer 2025 - Northwestern St. Johns County Edition

(World Golf Village, Julington Creek, St. Johns)

10,000 Seniors whose Net Worth is over \$1,000,000











