City of ALACHUA

APPLICATION FOR SENIOR RESOURCES ADVISORY BOARD MEMBERSHIP

Name: Susan Shannon-Sapp Date: 9-13-22

Physical Address: 13645 NW 222nd Lane Alachua Fl 32615

Mailing Address: PO Box 1954 Alachua Fl 32616-1954

Email Address: susanshannonsapp@gmail.com

Phone (Daytime): 352-258-2608

Alternate Phone: ______

Are you a resident of the City of Alachua? ☑ Yes ☐ No

Briefly state why you want to be a member of the Senior Resources Advisory Board:

I recenty developed a program for Seniors - Beyond the Will Presentation I have presented this to several seniors from Flagler Beach and Turkey Creek Forest and First Baptist Church in Alachua. The feedback from the presentation has been very positive and well received. I have also been asked the present this program to the Senior Center as well as the YMCA. I am a senior myself and can relate to the issues they exerience in their lives. I am also an active participant in the local Chamber of Commerce, Women's Club and began a Senior Small Group at Canvas Church. I previously resided in a 55+ Community for over 12 years in Marion County and participated in developing activities for the the seniors within the community. I know I will prove to be an asset to this committee.

Applicant's Signature: Susan Shannon Sapp

Please return this application to the City Clerk's Office located at City Hall, 15100 NW 142nd Terrace, or mail application to:

City of Alachua
ATTN: Planning and Community Development
P.O. Box 9
Alachua, FL 32616

My business experience includes: Claims Services Manager - Nationwide Insurance 1980-2009
I owned by own Real Estate Company Susan Shannon Real Estate Services LLC from 2001 - 2022.
Created a new business venture: Gator Senior Services LLC - 2022 - Present

S.A.I.L

Seniors with Active Independent Lifestyles

BeyondtheWill.com

Agenda

Creating the Estate Planning Notebook

Administrator Checklist -

1. Funeral Arrangements
2. Life Insurance Policies
3. (4) Items that may require immediate attention
    a. Direct Deposits (Incl SSN, Pensions)
    b. Healthcare Deductions
    c. Credit Cards
    d. Phone Bill Carrier
4. Estate Planning / Trust Contact info
5. Investment Portfolio / Outside of trust contact info.
6. Outstanding Mortgages
7. Monthly Household Expenses
8. Annual Household Expenses
9. Homeowner Insurance / Property Taxes
10. Vehicle Information – Insurance and Registration
11. Checking / Saving Accounts (Identify if not part of Trust)
12. Post Office Box or Safety Deposit Boxes
13. Designation regarding Sale of Home
14. Disposal of Personal Property
15. Instructions for Pet (if Applicable)
16. List of any scheduled Charity Donations – if applicable
17. List of all Clubs/Organizations affiliated

Elements for Table of Contents (These were mine - yours may differ based on specific needs)

1. Checklist
2. Health Care / Advance Directives (Organ Donor / DNR)
3. Funeral
4. Cemetery (If different than Funeral)
5. Life Insurance
6. Last Will
7. Living Will
8. Trust
9. Power of Attorney
10. Income (SSN/Pension/401k)
11. Investments
12. Bank Accounts
13. Homestead Property
14. Household Expenses (Contact info)
15. Memberships
16. Taxes – Name of Accountant
17. Contacts – Copies of Business Cards (incl Medical)
18. Personal Documents – Birth Certificates, Marriage License)
19. Veteran Administration – If applicable (DD214)
20. Homeowner Benefit Program / Reverse Mortgage (if applicable)
21. 23 & Me , Ancestry (if applicable)

<u>Other Folders to keep separate:</u>

Medical Documentation

1. HIPPA Contacts – Include: Relationship, Phone and Email
2. Pharmacy – Include: Name and Location
3. Prescriptions – Include: Name, Dosage and Frequency
4. Vitamins and Supplements if applicable
5. Allergies – if applicable
6. Primary Care Physician
7. Specialty Physicians – if applicable
    a. Women – Pap Smear, Mammogram
    b. Colonoscopy
    c. Dermatologist
    d. Optometric Physician
8. Major Surgeries – List Type, Date and Physician

Home Improvements Documentation – to assist in determining value of property
Downsizing and Inventory - documentation values of collectibles

<u>Other topics of discussion:</u>

GRIEFSHARE

Grief Share (group)
Steven Ministry (one-on-one)
https://www.griefshare.org

Encourage family to seek support as needed – Many Churches and/or Funeral homes have local contact information

Attorney General Ashley Moody
Seniors vs Crime
A Special Project of the Florida Attorney General
800-203-3099

Three Rivers Legal Services, Inc.

1-866-256-8091
info@tris.org
Low Income Legal Advisor

<u>Legacy – More than just monetary possessions -</u> Source: Tony Robbins
A legacy is a lasting impact on the world. It's a gift that is passed down through generations: money, properties or even stories.
It can also be a business – or the profits from a business, set up in a foundation or charity.
Leaving a Legacy means dreaming big and changing the world for the better. And it is a powerful driver for the most successful people. 1. Discover your purpose 2. Reveal your natural skills and abilities 3. Unlock your passion 4. Determine your x-factor – unique to you 5. Create a business map 6. Inspire the next generation 7. Give Back

Resource: **Storyworth** Everyone has a story worth sharing. Preserve meaningful moments and memories in a beautiful keepsake book. Then, share the experience with loved ones and discover stories you never knew.

Gator Senior Services LLC does NOT provide any Legal or Financial Advice.