

# FINANCIAL FOCUS



# Can you build an estate plan like a house?



By Cory Taylor

are the same as those needed to build an estate plan. What are those steps? Here are some to consider:

**Get the right “builder.”**

Unless you’re an experienced do-it-yourselfer, you’ll probably have to hire someone to build a house for you. Of course, you’ll make your wishes known about what you want your house to look like, but you’ll be relying on the builder’s expertise.

And the same is true with estate planning — you’ll want to share your goals and vision with a legal professional who’s experienced in creating comprehensive estate plans.

**Build a strong foundation**

“Every house needs a strong foundation” isn’t just a metaphor — it’s true for every house that’s built. And when you create an estate plan, you also need a foundation that includes whatever basic elements are appropriate for your situation — a will, a living trust, power of attorney and so on.

**Make the necessary additions.**

Even if you’re pleased with your new house, you may eventually decide to make some changes, such as adding on a new bedroom or bathroom. And the structure of your estate plan may need to undergo some modifications, too.

For example, if you drew up a will two decades ago, but haven’t looked at it since, it

may be out of date — especially if you’ve experienced changes in your life, such as new children or a divorce and remarriage. That’s why it’s a good idea to review your estate plans at least every few years.

**Protect your investment**

Of course, when you build a new house, you’ll have to insure it properly. And while there’s no actual “insurance policy” for an estate plan, you do have ways to protect it.

For one thing, you need to make sure beneficiary designations on retirement plans, investment accounts, insurance policies and other assets are correct. These designations are powerful and can even supersede the instructions in your estate-

planning documents. So, as mentioned, if you’ve had significant life changes involving your family, you need to ensure your beneficiary designations are updated if you want to protect how insurance proceeds, investments and other assets are distributed.

**Watch for mistakes**

It’s unfortunate, but mistakes do happen in home construction. Water stains can indicate that water is seeping through cracks in the foundation. Or cracks in retaining walls and garage floors could be a sign that the concrete structures were installed improperly.

Estate plans can also contain errors or bad choices. Some are inadvertent, such as failing to put intended

assets into a trust, but others are done with the best of intentions, such as naming adult children as joint owners of your assets.

Even if your children are quite responsible, this move could give their creditors access to your money. If you want your children to be able to step in as needed, you could find other methods, such as giving them power of attorney.

Following these “construction” techniques can help you create an estate plan that can last a lifetime — and beyond.

*This article was written by Edward Jones for use by local Edward Jones Financial Advisor Cory Taylor, who can be reached by calling (850) 223-0999.*

# Alliant has provided operational management for DMH since 2019

## DMH CEO

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services to community hospitals. Alliant has provided administrative, day-to-day operational and financial management support to DMH since May 2019, when the DMH Board signed a management agreement with the national consulting firm.

Alliant President and CEO Michael Kozar expressed his appreciation to Schmidt for his dedication to DMH over the past two years.

“Chris helped carry us through the pandemic and extended services available in Taylor County,” Kozar said. “We are excited that he will be expanding his role with Alliant and that

his skills and leadership will continue to be an asset to the Alliant Management team.”

Schmidt will remain at DMH through Friday, June 9, when Lauren Faison-Clark will become interim CEO. Faison-Clark is administrator of regional development for Tallahassee Memorial HealthCare (TMH). She has been a DMH board member since

2013 and served as interim DMH CEO in late 2021 with great success.

“We greatly appreciate Chris’ contributions to DMH and the Taylor County community and his support in Ms. Faison-Clark’s on-boarding,” DMH Board Chair Pat Barbaree said. “We wish Chris all the best in his future endeavors.”

Faison-Clark says she

looks forward to continuing to drive initiatives and grow programs that make DMH a premier healthcare partner for employees, patients and the community.

Founded in 1957, DMH is a private, nonprofit, 48-bed hospital committed to being a trusted leader in healthcare. DMH offers emergency services, primary care, short-term inpatient

rehabilitation, a full line of radiology services, wound care and additional outpatient services.

DMH contracts with Alliant Management Services for administrative operations and has a formal partnership with Tallahassee Memorial HealthCare (TMH) to enhance service capabilities and resources available to DMH.

# Main building will include 16 studio, 24 one-bedroom apartments

## SENIOR LIVING

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the Florida Vernacular style and provide a mix of 56 assisted living and memory care units, in addition to six cottage-style units in three detached “independent living residential villas.”

The main building of Pine Village will have interior courtyards and gardens, allowing residents to spend time outdoors without leaving the community, and a large modern kitchen serving well-appointed dining rooms. Plans also include a hair salon, chapel and pub, according to a press release from SRI Management.

In addition to the main assisted living and memory care building (featuring 56 units), the community will provide three duplex-style “independent living” residences (six units) detached from the main community building for a total of more than 57,000 square feet of building space.

The three “Independent Living Duplex Cottages” will feature six two-bedroom/ two-bath cottage-style units “with all the amenities of a well-

appointed modern home,” including a one-car garage.

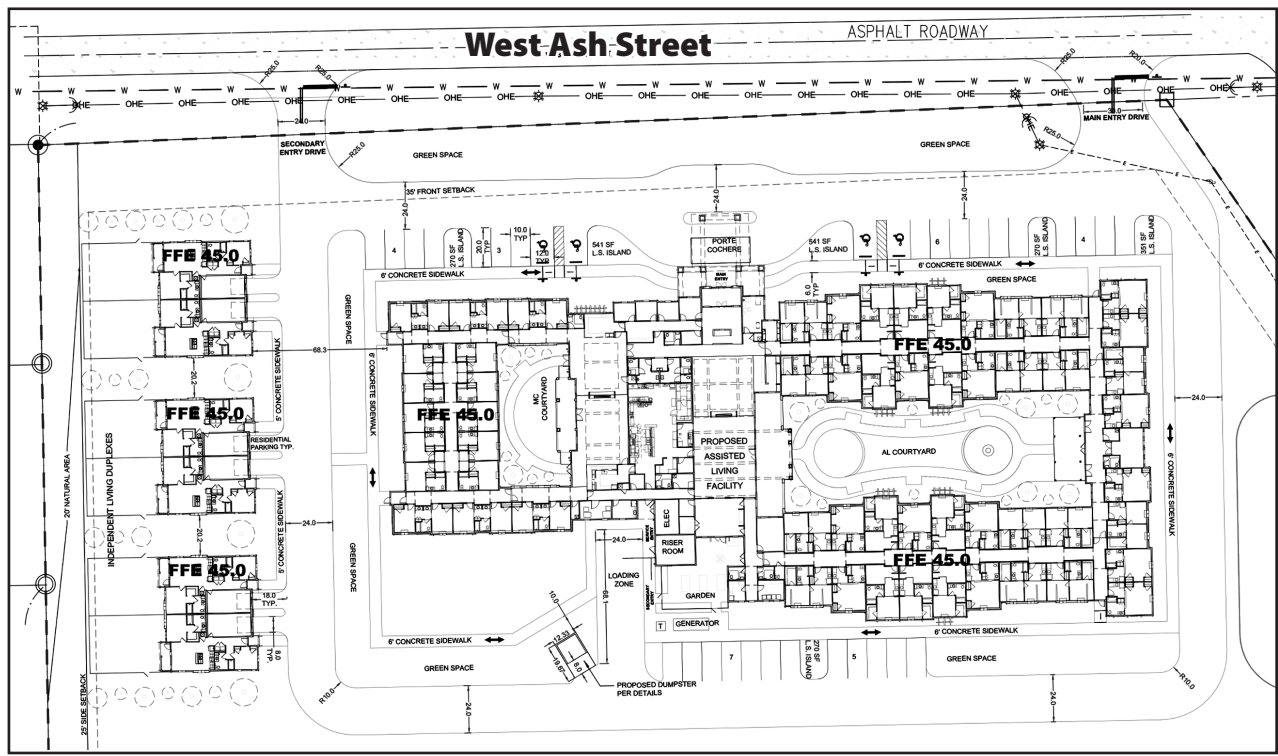
The one-story senior living community main building will include: 16 “assisted living studio” apartments, 14 assisted living one-bedroom units, 10 assisted living large one-bedroom units, 10 “Memory Care Studio” units and six “Memory Care Suites.”

Plans include concrete sidewalks, asphalt driveways, landscaping and green areas and stormwater retention ponds.

“When planning, building and ultimately operating a community such as Pine Village of Perry, many things need to take place. So far, we’re moving in the right direction,” SRI Management CEO Don Bishop said. “Although we’re in the early stages for this community, our team is hard at work with the many stakeholders involved to get this project off the drawing board.”

SRI Management (part of SR Companies, based in Tallahassee) was founded in 2000 by Bishop, who is married to Perry native and Taylor County High School graduate Allison (Kinsey) Bishop.

“Along with our



Above is the preliminary site plan for Pine Village of Perry. The main building of Pine Village will have interior courtyards and gardens, allowing residents to spend time outdoors without leaving the community, and a large modern kitchen serving well-appointed dining rooms. Plans also include a hair salon, chapel and pub, according to a press release from SRI Management. In addition to the main assisted living and memory care building (featuring 56 units), the community will provide three duplex-style “independent living” residences (six units) detached from the main community building for a total of more than 57,000 square feet of building space.

fundamental values of Character, Compassion, Commitment, Consistency, and Communication, we embrace the Golden Rule of treating others exactly as we would like to be treated,” Bishop said. “We

also believe all people are important, and we are passionate about offering an exceptional senior living experience to residents and their families.”

Since its inception in 2000, SRI Management’s leadership has consistently sought to be at the forefront of changes in the industry and forging strong relationships with owners.

Each SRI-managed property seeks to achieve optimal results in all areas of operations, including resident care, associate satisfaction and retention

and financial performance.

SRI Management currently manages more than 40 independent, assisted living and memory care communities, encompassing over 4,100 units, including 22 in Florida, six in Georgia, as well as facilities in South Carolina (four), Kentucky (three), Alabama (two), Tennessee (two), Texas (two), Virginia (two) and Indiana (one).

More information on SRI Management can be found at [www.srimgt.com](http://www.srimgt.com).

Pine Village of Perry will be accessed via entrances

off of West Ash Street, according to construction plan documents, which indicate the property is owned by San Pedro Investments, LLC (registered agent Michael R. Lynn).

Local general contractor Michael Lynn, Inc. is also listed as the contractor of record on the permit application.

Construction will begin once all applicable permits have been issued and is expected to be completed within one year from the date work begins.

# Brynes: ‘We want them to pay’

## DAMAGED RIMS

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before, and there was no documentation there was an issue with the road,” Hart replied.

“That is not a good reason,” Brynes responded. “No, it is not,” Woodfaulk agreed.

“Go back to them and tell them we want them to pay the bill,” Brynes

stated.

“Exactly,” Woodfaulk added.

Hart agreed to submit the request to the insurance company as the council directed.

# LEGALS

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preference in the amount of five percent (5%) of the bid price. NO FAXED BIDS WILL BE ACCEPTED.

Taylor County is an AA/EEO employer and requires all contractors and subcontractors to comply with Executive Order 11246.

For additional information and a bid package contact:

LaWanda Pemberton  
201 E. Green Street  
Perry, FL 32347  
(850) 838-3500 Ext 6  
[lpemberton@taylorcountygov.com](mailto:lpemberton@taylorcountygov.com)  
Bid packages may also be obtained from [www.taylorcountygov.com](http://www.taylorcountygov.com)

**IN THE CIRCUIT COURT, THIRD JUDICIAL CIRCUIT, IN AND FOR TAYLOR COUNTY, FLORIDA.**  
**CASE NO. 2023 - 360 - CP**  
IN RE: ESTATE OF JOSEPH TERRY WRIGHT, DECEASED.  
**NOTICE TO CREDITORS**  
The administration of the estate of JOSEPH TERRY WRIGHT, deceased, whose date of death was February

7, 2023; File Number 2023-360-CP is pending in the Circuit Court for Taylor County, Florida, Probate Division, the address of which is Post Office Box 620, Perry, Florida 32348. The names and addresses of the Personal Representative and the Personal Representative’s Attorney are set forth below.

All creditors of the decedent and other persons having claims or demands against decedent’s estate, on whom a copy of this notice has been served, must file their claims with this court WITHIN THE LATER OF 3 MONTHS AFTER THE DATE OF THE FIRST PUBLICATION OF THIS NOTICE OR 30 DAYS AFTER THE TIME OF SERVICE OF A COPY OF THIS NOTICE ON THEM.

All other creditors of the decedent and other persons having claims or demands against decedent’s estate must file their claims with this court WITHIN 3 MONTHS AFTER THE DATE OF THE FIRST PUBLICATION OF THIS NOTICE.

ALL CLAIMS NOT SO FILED WILL BE FOREVER BARRED.

NOTWITHSTANDING THE TIME PERIOD SET FORTH ABOVE, ANY CLAIM FILED TWO (2) YEARS OR

MORE AFTER THE DECEDENT’S DATE OF DEATH IS BARRED. The date of first publication of this notice is June 7, 2023.

G. CLINE MOORE  
ATTORNEY AT LAW, P.A.  
Patricia Ashley Wright  
Personal Representative  
411 Judson Drive  
Perry, Florida 32348  
G. CLINE MOORE  
Attorney for Personal Representative  
Florida Bar No. 119512  
107 East Green Street  
Perry, Florida 32347  
Telephone: (850) 584-3300  
Email: [kende@fairpoint.net](mailto:kende@fairpoint.net)

**NOTICE IS HEREBY GIVEN:**  
ANGELA BLACK  
Last known address of:  
700 W Julia St  
Perry, Florida 32347  
You are hereby notified that your eligibility to vote is in question. You are required to contact the Supervisor of Elections, in Perry, Florida, no later than thirty (30) days after the date of this publishing. Failure to respond will result in a determination of ineligibility by the

Supervisor and your name will be removed from the statewide voter registration system.

**IN THE 3RD JUDICIAL CIRCUIT COURT IN TAYLOR COUNTY, FLORIDA**  
**CASE NO. 23-043-CA**  
21ST MORTGAGE CORPORATION, Plaintiff, vs.  
DANIEL CLAXTON PEAKE; UNKNOWN SPOUSE OF DANIEL CLAXTON PEAKE; and UNKNOWN TENANT Defendant.  
**NOTICE OF SALE**  
NOTICE IS HEREBY GIVEN pursuant to a Final Judgment dated May 31, 2023, entered in Case No.: 23-043-CA of the Circuit Court in and for Taylor County, Florida, wherein DANIEL CLAXTON PEAKE is the Defendant, that Gary Knowles, the Clerk of Court and Comptroller, will sell to the highest and best bidder for cash, on the east steps of the Taylor County Courthouse, 108 North Jefferson Street, Perry, FL 32348, on July 20, 2023 at 11:00 a.m., the following described real property as set forth in the Final Judgment: SEE ATTACHED EXHIBIT

“A”  
TOGETHER WITH A 2019 LIVE OAK 76X32 MANUFACTURED HOME BEARING SERIAL NO.S: LOHGA31870569A AND LOHGA31870569B.  
NOTICE IF YOU ARE A PERSON CLAIMING A RIGHT TO FUNDS REMAINING AFTER THE SALE, YOU MUST FILE A CLAIM WITH THE CLERK NO LATER THAN THE DATE THAT THE CLERK REPORTS THE FUNDS AS UNCLAIMED. IF YOU FAIL TO FILE A CLAIM, YOU WILL NOT BE ENTITLED TO ANY REMAINING FUNDS. AFTER THE FUNDS ARE REPORTED AS UNCLAIMED, ONLY THE OWNER OF RECORD AS OF THE DATE OF THE LIS PENDENS MAY CLAIM THE SURPLUS.  
Dated this 2nd day of June, 2023.  
Clerk of the Circuit Court  
By: Kathryn Lago  
As Deputy Clerk

**NOTICE**  
“If you are a person with a disability who needs any accommodation in order to participate in this proceeding, you are entitled, at no cost to you, to the provision of certain assistance. Please contact Court Administration, 173 NE

Hernando Avenue, Room 408, Lake City, Florida 32055; [adamall@jud3.flcourts.org](mailto:adamall@jud3.flcourts.org); (386) 758-2163 at least 7 days before your scheduled court appearance, or immediately upon receiving this notification if the time before the scheduled appearance is less than 7 days; if you are hearing or voice impaired call 711.”

**EXHIBIT “A”**  
COMMENCE AT THE NORTHWEST (NW) CORNER OF SECTION 14, TOWNSHIP 4 SOUTH, RANGE 7 EAST, TAYLOR COUNTY, FLORIDA; THENCE RUN NORTH 88 DEGREES 59’ 40” EAST ALONG THE SECTION LINE 895.02 FEET; THENCE RUN SOUTH 00 DEGREES 27’ 47” WEST 869.12 FEET TO THE POINT OF BEGINNING; THENCE RUN N 88 DEGREES 57’ 26” EAST 384.56 FEET; THENCE RUN SOUTH 00 DEGREES 27’ 47” WEST 453.25 FEET TO THE NORTH RIGHT-OF-WAY LINE OF WT GRUBBS ROAD; THENCE RUN SOUTH 88 DEGREES 57’ 26” WEST ALONG SAID RIGHT-OF-WAY LINE 384.56 FEET; THENCE RUN NORTH 00 DEGREES 27’ 47” EAST 453.25 FEET TO THE POINT OF BEGINNING. SAID PARCEL CONTAINS 4.0 ACRES MORE OR LESS.