



## we plan

### Appointment Checklist

*Thank you!*

*In order to get the most out of our session, please have the following items below handy.*

*I look forward to meeting you & helping with your advice needs.*

*Rosie B.*



#### **Details about your home & any other properties**

- Market value of home and rental potential.
- Current Rates Notice for all properties.
- Amount of outstanding mortgage (if any).
- Costs to maintain property, e.g. rates, home insurance, water, gas, body corporate, etc.



#### **Details about your health and lifestyle**

- Medical information as per ACAS assessment.
- Details of home care received previously.
- Certified copy of Enduring Power of Attorney.
- Details of medical costs, e.g. pharmacy and other out-of-pocket medical costs, health insurance premiums, etc.



#### **Details about your income & asset position**

- Details of Centrelink or Department of Veterans' Affairs pensions and entitlements.
- Balances for all bank accounts & term deposits.
- Managed investment & shares statements, including date of acquisition (if known).
- Latest information for income streams such as super pensions, defined benefits, & annuities.
- Superannuation statements.
- Details of any foreign income or pensions.
- Market values of personal items, e.g. vehicles, boats and caravans.
- Details of personal loans or credit cards.
- Details of any gifts or loans made in last 5 years.
- Latest 2x payslips (if employed).
- Latest financials for business/trust/company (if applicable).
- Rental schedule (if applicable).
- Estimate of your income & expenses (a guide is included on the reverse of this document).



#### **Other items required**

- Certified copy of Enduring Power of Attorney.
- Certified copy of Proof of Identification for client and all Attorneys.
- Details of costs associated with chosen facility (if applicable).

## Expense details

Home expenses	Combined (one for each property required)	
Mortgage/rent		
Council rates		
Body corporate/maintenance charge		
Water rates		
Electricity and gas		
Telephone and internet		
Home and contents insurance		
Maintenance costs		
Furnishings/appliances		
Other		
General expenses (before entering care)	Client 1	Client 2
Clothing		
Alcohol/cigarettes		
Groceries		
Travel/holidays		
Dining out		
Sport/recreation/hobbies		
Club memberships/sporting fees		
Books/magazines/newspapers		
Own transport (car/rego/petrol/insurance)		
Gifts/donations etc.		
Other		
Expenses (after entering care)	Client 1	Client 2
Private health insurance		
Pharmacy		
Out of pocket medical costs e.g. dental		
Transport (taxi fares etc.)		
Mobile phone		
General (haircuts, outings, etc)		
Lifestyle expenses (if partner still at home)		
Other		
Total		