

Aged care doesn't have to be difficult

Let us help guide you through the financial steps

Planning for aged care can be a stressful time. But early planning and good advice can help minimise stress for you and your family. You will face many personal and financial decisions as you make plans for your future. We can help you understand your available options and costs associated, & also show you the best way to structure your finances to afford the right care for you. Getting advice now will help you make the best choices for your future care, security, & happiness.

Package inclusions	<i>Do For You</i>	<i>Advise You</i>	<i>Show You</i>
	\$7,700 [^] – singles	\$3,300 [^] – singles	\$1,760 [^]
	\$9,900 [^] - couples	\$5,500 [^] - couples	

Information

Prices include GST

It is important we understand your current situation and what's important to you. We want to provide you with the information you need to make the right choices for you.

Our initial consultation will:

Help you understand the aged care landscape & impact on Centrelink/DVA pension	Included	Included	Included
Explain how we can help you to achieve what's important to you	Included	Included	Included

Cashflow report:

	Included	Included	Included
Summary of your current situation, goals and objectives	Included	Included	Included
Explanation of your aged care fees	Included	Included	Included
Cashflow report			

Advice

Information is useful, but advice is invaluable. We can take the information you gave us in the first meeting and apply the rules to give you options and advice that is tailored to your individual circumstances.

Our advice to you will include all the above, plus:

A detailed advice document and strategy meeting

Your aged care options – up to five alternatives for restructuring your assets and meeting your specific goals and objectives	Included	Included	X
Taxation & estate planning implications of each option	Included	Included	X

Cashflow and asset projections to show you the outcome of each option over the next five – ten years in care	Included	Included	X
Strategy meeting to discuss the advice document and help you understand the implications of your decisions	Included	Included	X
Cashflow and asset projections to show you the outcome of each option over the next five – ten years in care	Included	Included	X

Additional services

Aged care costs can change frequently, and the statements issued can be overwhelming and confusing. Our range of additional services provide you and your family with peace of mind knowing an expert is a phone call away.

Our service to you will include the above, plus:

Reviewing the resident and accommodation agreements (or home care agreement)	Included	X	X
Liaising with the provider if requested	Included	X	X
Phone and email support throughout the duration of the project*	Included	X	X
Liaise with your solicitor, financial planner and/or accountant	Included	X	X
If included in the recommendations, complete, lodge and follow-up investment applications	Included	Additional charges apply for product support &/or implementation	

Helping you with Centrelink or DVA Additional \$990 for singles or \$1,320 for couples (inc. GST)

Dealing with Centrelink/DVA can be time consuming, confusing, and incredibly frustrating. It's made much easier if you understand their rules and regulations, like we do. It's our specialty!

We will help you by:

Assisting you to complete your cost of care form	Included	Included	X
Initial review of your Centrelink/DVA record	Included	Additional charges apply for Centrelink and/or DVA assistance.	
Reviewing invoices from the facility for the duration of the project*	Included	Additional charges apply for Centrelink and/or DVA assistance.	
Becoming your correspondence nominee and managing all correspondence, issues and updates for Centrelink/DVA throughout the duration of the project*	Included	Additional charges apply for Centrelink and/or DVA assistance.	

^A There may be a surcharge for complex cases including couples both going into care, low-means resident assessments or financial situations involving trusts, private companies, farms, family businesses, etc.

* Timeframe to be agreed before commencement. Service can be renewed on a regular basis going forward, (additional fees apply).