Logo Aged Care Services

Image

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Tick Box **ESSENTIALS Package $770** *…….When you know what you want….*

* Explanation of Aged Care Fees and Charges. **Peace of Mind**
* Preliminary Home/Assets Assessment.\*
* Estimated Means Tested Fee Calculation.\*
* Preliminary Aged Care Costs.\*
* Estimated Cash Flow Scenario.\*

\*Please note this is general factual information only. We do not provide any specific personal information.

Tick Box **ADVANTAGE Package $2,970***….When you need to know all the options….*

**ESSENTIALS** Package *plus*

* Analyse and Strategize Aged Care costs. **Confidence**
* Compare up to 5 Strategy options.
* Minimise Aged Care Costs (where possible).
* Maximise Age Pension Income (where possible).
* Prepare a Full Statement of Advice (SOA).
* Implementation of Aged Care Strategy.

Tick Box **PLATINUM Package $5,940***….When you need someone to take charge….*

**ADVANTAGE** Package*plus*

* Liase with the Aged Care Facility.  **Convenience**
* CentreLink/DVA Nominee.
* Post Entry Review.
* Post Implementation SOA (if required).
* Annual Review.

**EXTRA CHOICE OPTIONS**

Tick Box **CentreLink/DVA Nominee $1,100**

Communicate with CentreLink/DVA on behalf of our client/s, and undertake all changes and updates to details, as directed by our client.

Tick Box **Post Implementation Statement of Advice $1,650**

Revise our original Advice Statement for any changes of circumstances including income & asset variations, and provide further advice within the first 12 months of initial advice statement.

Tick Box **Annual Review $990**

A review of the recommendations made in our original advice document, taking into account any changes to client’s circumstances including checking current cash flow is sufficient to meet ongoing aged care costs.

Tick Box **Post Entry Review $660**

Review financial situation, check facility invoices are accurate, explain the Residential Aged Care Agreement and ensure all recommendations are implemented.

Tick Box **Facility Liason $550**

Negotiate with the Aged Care Facility regarding Accommodation payments, clarify & explain Residential Care Agreement, and review facility invoices.

Tick Box **Family Conferences $660**

Facilitate & co-ordinate family meetings to explain the Aged Care legislation and how it fits with the family circumstances.

Tick Box **Estate Wrap $660**

Assist beneficiaries with correct procedures and paperwork regarding the finalisation of the estate.

I/We have chosen the Service Package and Options as ticked above. I/We understand that by choosing the Essentials Package, that I/We are receiving factual information only, and not financial advice. I/We agree to pay the amount of ……………….., within seven days of the date of the invoice received from Financial Success SA.

………………………………………. ……………………………………. ………………………………….. …..../….…./………

Signature Signature Signature Date

……………………………………….. ………/……../………

Adviser Signature Date

Important Information

This document has been prepared by Financial Success SA Pty Ltd ABN 68 114 614 838, an Authorised Representative of Financial Wisdom Limited ABN 70 006 646 108 AFSL 231138, a wholly owned, non-guaranteed subsidiary of the Commonwealth Bank of Australia ABN 48 123 123 124.

Information in this document is based on current regulatory requirements and laws, as at 20 September, 2016 which may be subject to change. It contains general advice. It does not take into account your individual objectives, financial situation or needs. You should consider talking to a financial adviser before making a financial decision.