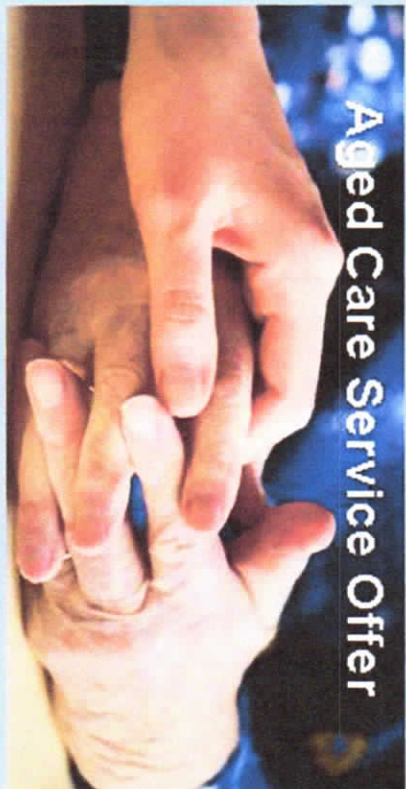


## Aged Care Service Offer



### ☐ ESSENTIALS PACKAGE \$770 – When you know what you want

- Explanation of Aged Care Fees and Charges
  - Preliminary Income Assets Assessment\*
  - Estimated Means Tested Fee Calculation\*
  - **Confidentiality**
    - Preliminary Aged Care Costs\*
    - Estimated Cash Flow Summary\*
- \* PLEASE NOTE: THIS IS GENERAL FACTUAL INFORMATION ONLY. WE DO NOT PROVIDE ANY SPECIFIC PERSONAL FINANCIAL ADVICE

### ☐ ADVANTAGE PACKAGE \$2970 – When you need to know the options

- **ESSENTIALS PACKAGE plus Strategy**
  - Analyse and Strategise Aged Care Costs
  - Compare up to 5 Strategy options
  - Maximise Pension Income (where possible)
  - Prepare Full Statement of Advice (SOA)
  - Implement Aged Care Costs (where possible)
  - Implementation of Aged Care Strategy\*

### ☐ PLATINUM PACKAGE \$9,940 – When you need someone to take charge

- **ADVANTAGE PACKAGE plus Confidentiality**
  - Liaise with Aged Care Facility
  - Centrefix/DVA Nominee
  - Post Entry Review
  - Post Implementation SOA (if required)
  - Life Time Annual Review



## EXTRA CHOICE OPTIONS

- ☐ Centrefix/DVA Nominee \$2100  
Communicate with Centrefix/DVA on behalf of clients and undertake all updates and changes to clients details as directed by clients

- ☐ Post Implementation Statement of Advice \$1650  
Review Advice Statement for any change of circumstances including income & asset variations and provide further advice in the first 12 months.

- ☐ Lifetime Annual Review \$950  
Annual review of the income evidence made in our advice document and any changes to client's circumstances, checking current cash levels are sufficient to meet ongoing aged care costs.

- ☐ Post Entry Review \$950  
Review financial situation, check facility invoices are accurate, explain the Residential Care Agreement and ensure all recommendations are implemented

- ☐ Facility Liaison \$330  
Negotiate with Aged Care facility regarding accommodation payments, staff and explain residential care agreements and review facility invoices.

- ☐ Estate Map \$650  
Assist beneficiaries with correct procedures and paperwork regarding the finalisation of estate.

- ☐ Agent Select \$330  
Where a sale of the client's home is to be undertaken, provide a panel of 3 local agents who will submit quotations for the sale of the property, including estimated valuations

☐ I choose the Service Offer and Options ticked above and understand that by choosing the Essentials Package I am receiving factual information not financial advice.

Client 1 Signature \_\_\_\_\_ Client 25 Signature \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_

Adviser's Signature \_\_\_\_\_

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