

### **Aged Care Meeting Preparation:**

You may hear that you need to complete a lot of forms for aged care. This isn't always correct \ or as true as it once was.

*We can assist you to work out if you need to complete forms and \ or which ones.*

Our main form we ask you to complete and lodge with Centrelink (Services Australia) is the SS313.

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### [Authorising a person or organisation to enquire or act on your behalf form \(SS313\)](#)

***If you can submit this form with Services Australia before our meeting you will save time (if you can already see the residents details on your "mygov" you have likely already completed this.***

The information needed to complete the forms for Centrelink and to calculate the fees \ costs.

### **Please bring to the meeting:**

- Copy of Rates Notice (including for investment properties as well as Primary Residence)
  - If the resident is in a retirement village, please bring the exit value (ask facility for statement)
- Bank statements (or internet print out, we will need balances and account numbers)
- Share Holding Statements
- Superannuation \ Pension "**Centrelink Schedule**" (call super provider for a copy)
- Centrelink \ DVA card (or the CRN \ DVA numbers);
- Copies of Power of Attorney
- Any other financial assets or income (i.e. car make and model, international pensions).

### **Facility Details:**

- RAD (bond) amount payable;
- Extra Service Fee \ additional services Details

Please call me directly on [0424 61 60 60](tel:0424616060) to discuss or for assistance. We will not need these documents if the residents assets are in excess of \$3.5M. A ball park figure will help initially.

Yours sincerely,

**David Mac Manus** Grad Dip FP, CFP®, FChFP, Dip F.P.

DMFS Financial Advisers Pty Ltd

Authorised Representatives

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