











Our 10 steps to a financially stress free aged care process

Step 1 Day 1 <hr/> Complimentary 1st appointment		1	We want to learn, <ul style="list-style-type: none">• about your situation.• what's worrying you• what's important to you• what strategies you want explored We <ul style="list-style-type: none">• explain other strategies• give you vital tips• most importantly, relieve immediate concerns,
Step 2 Day 2 <hr/> Contact the aged care home		2	Admission can be within days. We must work fast. We will handle all financial discussions. Which will <ul style="list-style-type: none">• allow you to focus on caring for your family• reduce your workload and stress.
Step 3 Day 2 <hr/> Update you		3	We will explain <ul style="list-style-type: none">• explain the fee issues for the home.• explain the outcome of our discussions• make sure you are not worried.
Step 4 Day 2 <hr/> Advice process starts		4	We will <ul style="list-style-type: none">• start your statement of advice.• be in contact to discuss any concerns or questions.
Step 5 Day 14 <hr/> Present your advice		5	We will discuss <ul style="list-style-type: none">• agreed strategies and affordability• a plan to fund costs, both initially and ongoing• the structure and payment of the accommodation Payment• how to restructure assets to minimise aged care costs and maximise Centrelink/DVA entitlements• how to protect the the value of our client's assets

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Step 6 Day 15 Contact aged care home		6	We will discuss how the fees will be paid, <ul style="list-style-type: none">• initially• when the final strategy is implemented <p>This step must be completed within 28 days.</p>
Step 7 Day 80 Contact you		7	To see if <ul style="list-style-type: none">• assets have been sold, example family home• any updates on other issues• decide if advice needs to be updated• make sure you have no concerns
Step 8 Day 80 We update advice		8	if required, <ul style="list-style-type: none">• we update your advice at no charge, for example if a significant change of sale price of assets. <p>You will have wasted your time and money if this is not done for you.</p>
Step 9 Day 94 Appointment to present updated advice		9	We will discuss <ul style="list-style-type: none">• If any changes to the strategy are required• any new strategies to consider• what are the next steps
Step 10 Day 100 Follow up telephone call		10	Once final strategy implemented, <p>to make sure all your concerns are answered.</p>

