











Our 10 steps to a financially stress free aged care process

<p>Step 1 Day 1</p> <p>Complimentary 1st appointment</p>  <p>1</p>	<p>We want to learn,</p> <ul style="list-style-type: none">• about your situation.• what's worrying you• what's important to you• what strategies you want explored <p>We</p> <ul style="list-style-type: none">• explain other strategies• give you vital tips• most importantly, relieve immediate concerns,
<p>Step 2 Day 2</p> <p>Contact the aged care home</p>  <p>2</p>	<p>Admission can be within days. We must work fast. We will handle all financial discussions.</p> <p>Which will</p> <ul style="list-style-type: none">• allow you to focus on caring for your family• reduce your workload and stress.
<p>Step 3 Day 2</p> <p>Update you</p>  <p>3</p>	<p>We will explain</p> <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.
<p>Step 4 Day 2</p> <p>Advice process starts</p>  <p>4</p>	<p>We will</p> <ul style="list-style-type: none">• start your statement of advice.• be in contact to discuss any concerns or questions.
<p>Step 5 Day 14</p> <p>Present your advice</p>  <p>5</p>	<p>We will discuss</p> <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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<p>Step 6 Day 15</p> <p>Contact aged care home</p> 	<p>6</p>	<p>We will discuss how the fees will be paid,</p> <ul style="list-style-type: none">• initially• when the final strategy is implemented <p>This step must be completed within 28 days.</p>
<p>Step 7 Day 80</p> <p>Contact you</p> 	<p>7</p>	<p>To see if</p> <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
<p>Step 8 Day 80</p> <p>We update advice</p> 	<p>8</p>	<p>if required,</p> <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>
<p>Step 9 Day 94</p> <p>Appointment to present updated advice</p> 	<p>9</p>	<p>We will discuss</p> <ul style="list-style-type: none">• If any changes to the strategy are required• any new strategies to consider• what are the next steps
<p>Step 10 Day 100</p> <p>Follow up telephone call</p> 	<p>10</p>	<p>Once final strategy implemented,</p> <p>to make sure all your concerns are answered.</p>

