

DMFS Financial Advisers Pty Ltd

Level 8
350 Collins Street
Melbourne VIC 3000

P 1300 364 650
F 03 8672 0287
M 0424 616 060

E david@dmfsfinancial.com.au
W www.dmfsfinancial.com.au

Aged Care Meeting Preparation:

While this is a daunting task, completing the “SA457” which is the Centrelink income and assets assessment, the forms are completed by DMFS Financial Advisers efficiently and accurately if you can provide the below information.

Our office is located at
8 / 350 Collins Street,
Melbourne VIC 3000

[Google Map Link](#)

[1300 364 650](tel:1300364650)

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

Please bring to the meeting:

- Copy of Rates Notice (including for investment properties as well as Primary Residence)
 - If mum or dad are 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 Details

Please call me directly on [0424 61 60 60](tel:0424616060) to discuss or for assistance.

Yours sincerely,

David Mac Manus CFP®, FChFP, Dip F.P.
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Authorised Representatives
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