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DMFS Financial Advisers Pty Ltd

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Aged Care Meeting Preparation:

While this is a daunting task, completing the “SA457” or “SA486” 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.

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

Please bring to the meeting (tick when done):

- 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 (as 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 (premium \ additional) Service Fee Details

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

[Google Map Link](#)

**We can meet on site at an aged care facility,
in our offices (CBD \ Hawthorn) or complete
phone based tele meetings**

David Mac Manus CFP®, FChFP, Dip F.P. –
DMFS Financial Advisers Pty Ltd
Authorised Representatives
AUS Financial Advisers Pty Ltd
Australian Financial Services Licence No. 534501

PH: 1300 364 650

Please call me directly on 0424 61 60 60 to discuss or for assistance.

You can find this form and other relevant information at:

<http://www.agedcareforms.com.au/>

Ask General Practitioner (or social worker) for referral to ACAS



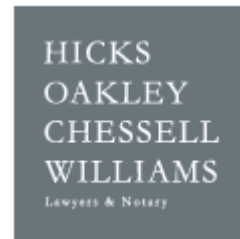
Aged Care Assessment Service \ Team (ACAS \ ACAT)



Contact David Mac Manus (0424 616 060) of DMFS Financial Advisers. For help with completing the SA457 / SA486 Assessment, and calculating fees (costs) and cashflow.



Contact Lachlan Vallance (03 9550 4600) of Hicks Oakley Chessell Williams Lawyers. For sensitive assistance with legal matters: wills, estates and powers of attorney.



RAD Refundable Accommodation Deposit

DAP Daily Accommodation Payment



Make decision on facility based on clinical needs, financial capacity etc.



Department of Human Services (in conjunction with Centrelink \ DVA and medicare).



Contact Lisa Eddey of Home Moving Planners. For help in moving contents, cleaning, and preparing house for rental or sale (incl staging and tipping service) - 0409 592 253.



vendor marketing

Contact Craig Knudsen (0403 091 511) of Vendor Marketing. To maximise the outcome of the home sale or Tara Hore for a rental appraisal and ongoing rental management (0458 440 558).



Contact Sarah Lindsey \ Lisa Yong (03 9550 4600) of Hicks Oakley Chessell Williams for assistance with conveyancing and property related matters.

