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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**

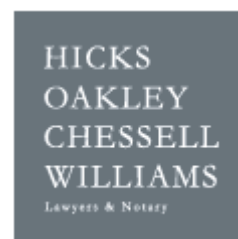
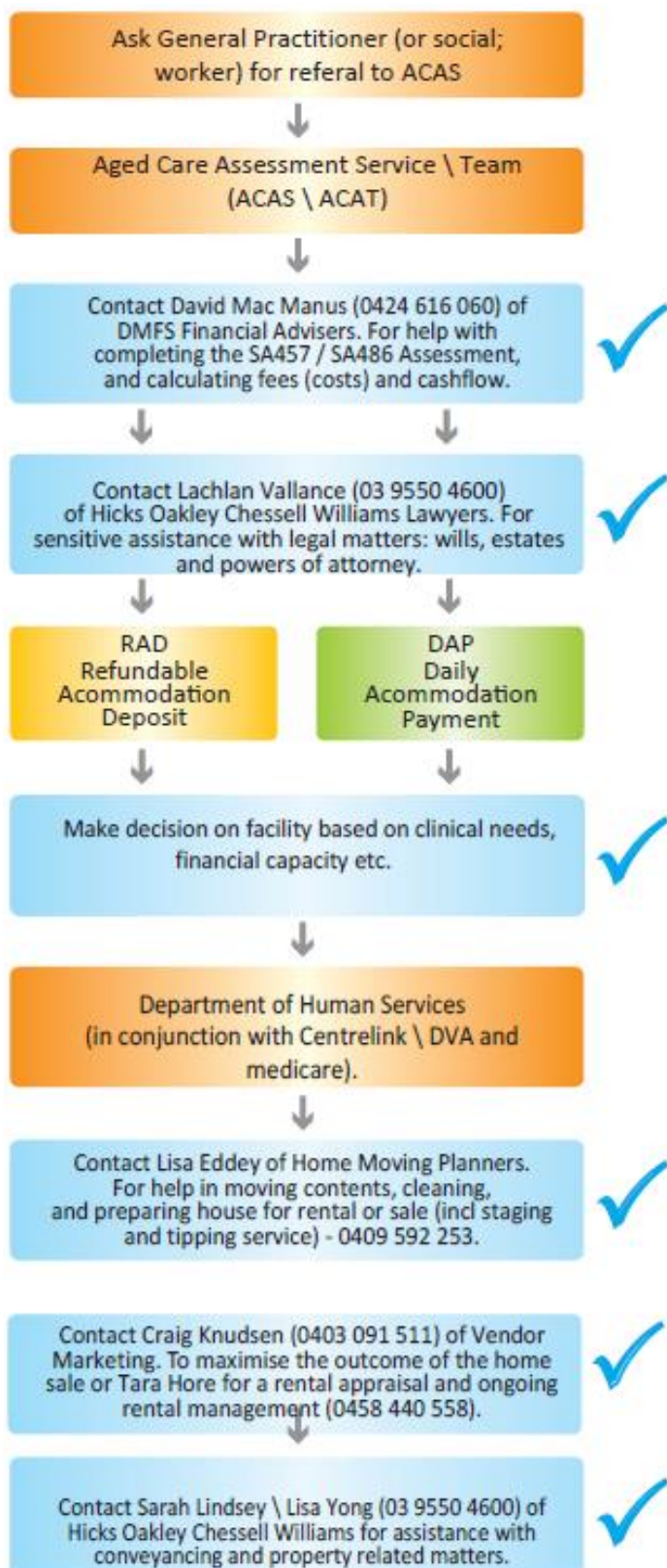
**David Mac Manus** CFP®, FChFP, Dip F.P. –  
DMFS Financial Advisers Pty Ltd  
Authorised Representatives  
AUS Financial Advisers Pty Ltd  
Australian Financial Services Licence No. 534501

**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/>



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