

# Aged Care Essential Fact Find

Date \_\_\_ / \_\_\_ / \_\_\_

Client Name: Mr./Mrs./Ms \_\_\_\_\_ Sex: M/F \_\_\_ Date of Birth: \_\_\_ / \_\_\_ / \_\_\_

State of health: Very good/Average/Fair/Poor \_\_\_\_\_ Dementia Diagnosed: Y/N \_\_\_\_\_

Health Insurance with: \_\_\_\_\_ or None: \_\_\_\_\_ Health insurance cost per year: \$ \_\_\_\_\_

Prepaid funeral contract with (name of Director): \_\_\_\_\_ Amount paid:\$ \_\_\_\_\_

Funeral Bond in force: Y/N \_\_\_ Name of Insurer: \_\_\_\_\_ Purchase price:\$ \_\_\_\_\_

Is the client single or has a spouse?: Single/Spouse \_\_\_\_\_

Name of Spouse (if applicable): \_\_\_\_\_ Does the spouse live in their home?: Y/N

If no spouse did a Carer live with the client?: Y/N \_\_\_ Relationship of Carer to Client: \_\_\_\_\_

Value of Home:\$ \_\_\_\_\_ Debt against Home:\$ \_\_\_\_\_ Cost to prepare to Rent/Sell:\$ \_\_\_\_\_

Home is owned by: Client/Spouse/Joint/Other \_\_\_\_\_

Is the 'Home' in Retirement Village?: Y/N \_\_\_ if Yes how much in exit fees?: \$ \_\_\_\_\_

## Other assets:

Asset class	Current value \$\$	Owner: Client/Joint/Spouse	Income \$\$ per year	Maturity date (Mth/Year)
Bank deposits				
Term Deposits				
Annuity				
Defined Benefit Pensions				
Account Based Pensions				
Share portfolio				

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Asset class	Current value \$\$	Owner: Client/Joint/Spouse	Income \$\$ per year	Maturity date (Mth/Year)
Managed Funds				
Accumulation phase Superannuation				

## Social security type pensions

Pension provider	Pension category	Owner	Income per year	Status
Centrelink				
DVA				
Overseas government				

Name of Enquirer: \_\_\_\_\_ Relationship to Client: \_\_\_\_\_

Contact phone: \_\_\_\_\_ Contact email: \_\_\_\_\_

Power of Attorney held?: Y/N \_\_\_\_\_

Names of others on PoA: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Valid Will in place?: Y/N \_\_\_\_\_ If yes are there any provision in Will as to the disposal of any specific assets?:

\_\_\_\_\_

