



Permanent Residential Aged Care Request for a Combined Assets and Income Assessment

Purpose of this form

The Australian Government Department of Human Services or the Department of Veterans' Affairs need details about your combined assets and income for permanent residential aged care purposes. The information you provide will be used to calculate your aged care fees and charges. The information will also be used to calculate the amount of Government assistance the provider may receive on your behalf.

When to use this form

Residents who enter residential aged care on or after 1 July 2014 may need to pay the maximum daily means tested fee if they do not have a combined assets and income assessment.

Having a residential aged care combined assets and income assessment will determine:

- the means tested fee you will pay for your care, **and**
- whether you qualify for additional Government assistance with your accommodation costs.

Note: This assessment is **NOT** relevant to either respite care, Home Care Packages or for financial hardship assistance.

You should have received the booklet *Information you need to know about your claim for Permanent Residential Aged Care Request for a Combined Assets and Income Assessment* with this form. In this claim, this booklet will be referred to as the **Information Booklet**. If you do not have this booklet, go to our website humanservices.gov.au/agedcare or call us on Freecall™ **1800 227 475**.

Definition of a partner

For the Department of Human Services purposes a person is considered to be **your partner** if you and the person are living together, or usually live together, and are:

- married, **or**
- in a registered relationship (opposite-sex or same-sex), **or**
- in a de facto relationship (opposite-sex or same-sex).

We recognise all couples, opposite-sex and same-sex.

For more information

Go to our website humanservices.gov.au/agedcare or call us on Freecall™ **1800 227 475**.

Call the Department of Veterans' Affairs on **133 254**, if you live in regional Australia call on Freecall™ **1800 555 254**.

To speak to us in languages other than English, call **131 202**.

Note: Call charges apply – calls from mobile phones may be charged at a higher rate. Calls to 1800 numbers are free of charge from a fixed phone.

If you have a hearing or speech impairment

TTY service Freecall™ **1800 810 586**. A TTY phone is required to use this service.

Interpreters and translations

If you need an **interpreter** or **translation** of any documents for our business, we can arrange this for you free of charge.

What else you will need to provide

This form tells you which **other documents** you need to provide.

Depending on your circumstances, you may have to fill in **other forms**.

Filling in this form

Please use black or blue pen.

Print in BLOCK LETTERS.

Mark boxes like this with a ✓ or ✗.

Where you see a box like this ► **Go to 5** skip to the question number shown. You do not need to answer the questions in between.

Help with your form

If you want information about how to answer the questions in this form, and:

- you receive a Centrelink income support payment, **or**
- you are a self-funded retiree,

call the Department of Human Services.

If you want information about how to answer the questions in this form, and:

- you receive a Department of Veterans' Affairs income support payment,
- call the Department of Veterans' Affairs.

For general information on fees and charges applying to aged care contact MyAgedCare. If you need specific advice on completing this form or on applying for financial hardship assistance, go to our website humanservices.gov.au/agedcare or call us on Freecall™ **1800 227 475**.

This form is not an application for Financial Hardship Assistance. For information about Financial Hardship Assistance, go to our website humanservices.gov.au/agedcare or call us on Freecall™ **1800 227 475**.

Returning your form(s)

Check that you have answered all the questions you need to answer and that you have signed and dated this form.

Return this form, and copies of additional documents by mail to the address on the letter accompanying this form. Or:

- if you receive an income support payment from Centrelink, return your form and any additional documents to:

**Department of Human Services
Residential Care
Reply paid 7821
Canberra BC ACT 2610**

- if you receive an income support payment from the Department of Veterans' Affairs, return your form and any additional documents to:

**Department of Veterans' Affairs
Aged Care Assets Assessments
GPO Box 9998
In your capital city**

Note: ACT residents should post their form to Sydney
NT residents should post their form to Adelaide

- if you do NOT receive an income support payment from either Centrelink or the Department of Veterans' Affairs, return your form to the Department of Human Services (address above).

You should do this **within 28 days** to make sure that your income for aged care daily fee purposes can be calculated as quickly as possible. Until this form is returned you could be asked to pay the maximum daily fee applicable.

If you cannot return all the forms or documents **within 28 days**, contact us for extra time.

Important information

Privacy and your personal information

Your personal information is protected by law, including the *Privacy Act 1988*, and is collected by the Australian Government Department of Human Services for the assessment and administration of payments and services. This information is required to process your application or claim.

Your information may be used by the department or given to other parties for the purposes of research, investigation or where you have agreed or it is required or authorised by law.

You can get more information about the way in which the Department of Human Services will manage your personal information, including our privacy policy at humanservices.gov.au/privacy or by requesting a copy from the department.

18 Does your partner currently receive a payment from either Centrelink or Department of Veterans' Affairs?

For more information, refer to *What is an income support payment?* in the **Information Booklet**.

No Go to next question

Yes Give details below

Your partner

Centrelink Reference Number (if known)

- - -

Name of Centrelink payment

Department of Veterans' Affairs reference number

Name of Department of Veterans' Affairs payment

Amount paid per fortnight

\$

Admission details

19 Please read this before answering the following question.

Important information: How you answer question 19 depends on whether this assessment is for a **previous admission** to residential care OR if it is for a **current admission** to residential care OR a **future admission** to residential care.

The assessment can only be for **ONE** of these 4 options.

What do you want this assessment for?

Tick ONE box ONLY

Option 1: My previous admission to residential care.

You will need to answer the following questions based on what your circumstances were on your previous dates of admission to care.

Go to 20

Option 2: My current admission to residential care.

You will need to answer the following questions based on what your circumstances were on your current date of admission to care.

Go to 20

Option 3: A future admission to residential care.

You will need to answer the following questions based on your current circumstances which will be referred to as the relevant date.

Go to 38

Option 4: I am considering opting in to the new arrangements from 1 July 2014.

I am a current aged care resident considering opting in to the new arrangements that apply from 1 July 2014 if I move to a different aged care service.

You will need to answer the following questions based on your current circumstances which will be referred to as the relevant date

Note: This assessment will NOT be considered as a formal request to opt-in. Opting-in to the new arrangements must be made in writing.

Go to 38

20 What was that date of admission to care?

Answer the following questions based on what your circumstances were on this admission date, which will be referred to as the **relevant date**.

Go to next question

21 Please read this before answering the following question.

Net market value is NOT the replacement or insured value. It is the amount you would get if you sold the item(s). Even if the Department of Human Services or the Department of Veterans' Affairs already has information about their value it can be important to update this information to take into account any changes in value. The value of your household contents and personal effects will be taken to be \$10,000 if you do not provide an estimate.

What is your estimate of the **net market value** of your (and your partner's) household contents and personal effects on the **relevant date** of admission to care?

\$

22 On the **relevant date** of admission to care, did you (and/or your partner) own or part-own your home?

Note: Answer 'Yes' to this question if your home was in a retirement village and you had paid an entry contribution, or if you were paying off a mortgage on your home, or if your home was owned by a private trust or a private company that was controlled by you (and/or your partner).

- No **Go to 70**
 Yes **Go to next question**

23 Do you (and/or your partner) still own the home that you had on the **relevant date** of admission to care?

- No **Go to next question**
 Yes **Go to 28**

24 What has been the change in ownership of your home that you had on the **relevant date** of admission to care?

Tick ONE box ONLY

- You sold your home **Go to next question**
 You transferred the title of your home to someone else **Go to 26**
 Your home was in a retirement village **Go to 27**

25 How much was your home sold for?

\$

On what date was your home sold?

/ /

 Attach documentation which gives details of the sale of your home, for example, a solicitor's settlement letter.
Go to 70

26 How much was your home worth at the time the title was transferred?

\$

On what date was the title transferred?

/ /

Did you receive anything in return for the title transfer?

- No
 Yes **How much did you receive?**

\$

 Attach documentation which gives details of the transfer, for example, a solicitor's letter or transfer documents.
Go to 70

27 What amount was (or will be) paid to you (and/or your partner) due to the retirement village unit being vacated?

\$

When was (or will) this amount be paid to you (and/or your partner)?

/ /

 Attach documentation which gives details of the amount paid under the retirement village agreement.
Go to 70

28 On the **relevant date** of admission to care, was your home:

Tick ONE box ONLY

- a mobile home, or caravan, or boat or a similar dwelling **Go to next question**
 a retirement village unit, including one for which an entry contribution was paid **Go to next question**
 a unit, flat or duplex that was **not** in a retirement village **Go to 34**
 a house (including a dwelling located on a farm) **Go to 34**

29 On the **relevant date** of admission to care, was your home occupied by your partner?

No **Go to 32**

Yes *Go to next question*

30 Does your partner still occupy your home?

No *Go to next question*

Yes **Go to 70**

31 On what date did your partner vacate your home?

32 What was the market value of your mobile home/caravan/boat **or** the entry contribution amount that would have been refundable if the retirement village unit had been vacated on the **relevant date** of admission to care?

 Attach documentation which gives details of the value on the relevant date.

33 On the **relevant date** of admission to care, did you (and/or your partner) have any loans for which your home was used as security?

No **Go to 64**

Yes Give details below

 Attach a copy of a statement showing the amount owing for each loan on the relevant date.

1 Description of the loan

Amount owing

2 Description of the loan

Amount owing

If you (and/or your partner) have more than 2 loans, attach a separate sheet with details.

Go to 64

34 On the **relevant date** of admission to care, was your home occupied by your partner?

No **Go to 47**

Yes *Go to next question*

35 Does your partner still occupy your home?

No *Go to next question*

Yes **Go to 37**

36 On what date did your partner vacate your home?

 Go to next question

37 On the **relevant date** of admission to care, did your home stand on more than 2 hectares (5 acres) of land?

No **Go to 70**

Yes **Go to 47**

38 **Please read this before answering the following question.**

Net market value is NOT the replacement or insured value. It is the amount you would get if you sold the item(s). Even if the Department of Human Services or the Department of Veterans' Affairs already has information about their value it can be important to update this information to take into account any changes in value.

The value of your household contents and personal effects will be taken to be \$10,000 if you do not provide an estimate.

What is your estimate of the **net market value** of your (and your partner's) household contents and personal effects on the **relevant date**?

39 Do you (and/or your partner) own or part-own your home?

Your home includes a mobile home, caravan, boat, or a unit in a retirement village for which an entry contribution was paid.

Note: Answer 'Yes' to this question if you are paying off a mortgage on your home or if your home is owned by a private trust or private company that is controlled by you (and/or your partner).

No **Go to 70**

Yes *Go to next question*

40 Is your home:

Tick ONE box ONLY

a mobile home, or caravan, or boat or a similar dwelling **Go to next question**

a retirement village unit, including one for which an entry contribution was paid **Go to next question**

a unit, flat or duplex that is **not** in a retirement village **Go to 44**

a house (including a dwelling located on a farm) **Go to 45**

41 Is your home occupied by your partner?

No **Go to next question**

Yes **Go to 70**

42 What is the market value of your mobile home/caravan/boat **or** the entry contribution amount that would be refundable if the retirement village unit is vacated?

\$

 Attach documentation showing the amount.

43 Do you (and/or your partner) have any loans for which your home was used as security?

No **Go to 64**

Yes Give details below

 Attach a copy of a statement showing the amount owing for each loan.

1 Description of the loan

.....
.....

Amount owing

\$

2 Description of the loan

.....
.....

Amount owing

\$

If you (and/or your partner) have more than 2 loans, attach a separate sheet with details.

Go to 64

44 Is your home occupied by your partner?

No **Go to 47**

Yes **Go to 70**

45 Is your home occupied by your partner?

No **Go to 47**

Yes **Go to next question**

46 Does your home stand on more than 2 hectares (5 acres) of land?

No **Go to 70**

Yes **Go to next question**

47 Your home address

.....
.....
Postcode

48 What type of property is your home:

House

Part of a farming property

Townhouse (including duplex/triplex)

Self contained flat (part of or attached to a house)

Unit/flat

How many units/flats are in the block?

Other Give details below

.....
.....

49 Who owns your home as shown on the property title?

You Percentage owned %

Your partner Percentage owned %

Other Give details below

Name of person/entity
Percentage owned %

50 What is the legal description (lot/section number) of the land?

Note: This information can be found on a rates notice.

Lot	Section
<input type="text"/>	<input type="text"/>

51 What is the area or dimension of the property?

Note: You do not need to answer this question if your home is a unit or flat.

Complete **ONE** of these measurements only.

Area in hectares

OR Area in acres

OR Area in square metres

OR Dimensions X

52 Give details of your home below

Number of bedrooms Number of bathrooms

Number of garages Approximate age

Floor area in squares OR
floor area in square metres

Your assessment of the home's condition

Good Fair Poor

Type of construction

EXTERIOR (e.g. brick, timber, fibro)

INTERIOR (e.g. plaster, not lined)

ROOF (e.g. iron, tiled)

Is there anything that may affect the value of the home
(e.g. swimming pool, new kitchen, no off street parking)?

53 At the **relevant date**, do you/did you (and/or your partner) have any mortgages on this property?

No **Go to next question**

Yes **Give details below**

 Attach a copy of a statement showing the amount owing for each mortgage.

1 Description of the loan

Amount owing

\$

2 Description of the loan

Amount owing

\$

If you (and/or your partner) have more than 2 loans, attach a separate sheet with details.

54 Does your home stand on more than 2 hectares (5 acres) of land?

No **Go to 56**

Yes **Go to next question**

55 What is your estimate of the current market value of the property, including land and buildings?

\$

Go to 64

56 Give your estimate of the value of:

The home and the surrounding 2 hectares (5 acres)

\$

The remainder of the property

\$

57 Is your home part of a farm property?

No **Go to 64**

Yes **Go to next question**

66 Please read this before answering the following questions.

A Carer's Allowance is not an income support payment.

At the **relevant date**, did you have a carer who was eligible to receive an income support payment from Centrelink or the Department of Veterans' Affairs (e.g. Age Pension or Service Pension) and who had been living with you in your home for the 2 years up to the relevant date?

No

Yes

67 At the **relevant date**, did you have a close relation who was eligible to receive an income support payment from Centrelink or the Department of Veterans' Affairs (e.g. Age Pension or Service Pension) and who had been living with you in your home for the 5 years up to the relevant date?

No

Yes

68 Did you answer 'Yes' to either question 66 or question 67?

No **Go to 70**

Yes **Go to next question**

69 Please read this before answering the following question.

It will be necessary for the Department of Human Services or the Department of Veterans' Affairs to verify the period that your carer or close relation had occupied your home and that they were eligible to receive an income support payment at the relevant date.

Consent by carer or close relation

I consent to the Australian Government Department of Human Services or the Department of Veterans' Affairs using information collected from me for income support payment purposes for the additional purpose of determining the value of the applicant's assets under the *Aged Care Act 1997*.

Carer or close relation

Family name

First given name

Second given name

Date of birth

Centrelink Reference Number (if known)

OR

Department of Veterans' Affairs reference number

Relationship to the applicant

Daytime phone number

Mobile number

Signature of carer or close relation

Date

70 Please read this before answering the following question.

You need to answer the following questions based on what your (and your partner's) assets were at the **relevant date**, refer to your answer to question 20.

Did you receive an income support payment from Centrelink or the Department of Veterans' Affairs (e.g. Age Pension or Service Pension)?

- No **Go to 72**
 Yes *Go to next question*

71 Please read this before answering the following question.

The Department of Human Services or the Department of Veterans' Affairs will already hold details about your (and your partner's) assets. If your assets or income has changed since you last advised us you will need to complete the following questions.

Note: If you are **regarded as being blind** for income support payment purposes and your payment is not being means tested by the Department of Human Services or the Department of Veterans' Affairs, then you must complete the following questions.

Have any of your assets or income details changed since you last advised the Department of Human Services or the Department of Veterans' Affairs?

- No **Go to 109**
 Yes *Go to next question*

72 At the relevant date, did you (and/or your partner) have any real estate properties other than your home?

- No **Go to 89**
 Yes *Go to next question*

73 How many properties in Australia and/or outside Australia do you (and/or your partner) own or have an interest in?

 **Note:** If you have/had more than one investment property, at the **relevant date**, you will need to copy and attach pages 15 to 17 covering questions 94 to 108 for each property.

74 Address of the property

Postcode

Country (if not in Australia)

75 What type of property is your investment property:

- Vacant land
 House
 Townhouse (including duplex/triplex)
 Self contained flat (part of or attached to a house)
 Part of a farming property or hobby farm
 Industrial premises
 Retail premises
 Commercial premises
 Unit/flat

How many units/flats are in the block?

Other **Give details below**

76 Who owned the property as shown on the property title, at the relevant date?

- You Percentage owned %
 Your partner Percentage owned %
 Other **Give details below**

Name of person/entity

Percentage owned
 %

77 What is the legal description (lot/section number) of the land?

Note: This information can be found on a rates notice.

Lot	Section
<input type="text"/>	<input type="text"/>

78 What is the area or dimension of the property?

Note: You do not need to answer this question if the property is a unit or flat.

Complete **ONE** of these measurements only.

Area in hectares

OR Area in acres

OR Area in square metres

OR Dimensions X

79 What is your estimate of the current market value of the property, including land and buildings?

Note: You do not need to have the property professionally valued. We may have an approved valuer do this at no cost to you.

\$

80 At the **relevant date**, do you/did you (and/or your partner) have any mortgages on this property?

No *Go to next question*

Yes Give details below

 Attach a copy of a statement showing the amount owing for each mortgage.

1 Description of the loan

Amount owing

\$

2 Description of the loan

Amount owing

\$

If you (and/or your partner) have more than 2 loans, attach a separate sheet with details.

81 Provide the following details of the main building (or tick the box if there are no buildings):

No buildings *Go to next question*

Number of bedrooms

Number of bathrooms

Number of garages

Approximate age

Floor area in squares OR
floor area in square metres

Your assessment of the building's condition

Good Fair Poor

Type of construction

EXTERIOR (e.g. brick, timber, fibro)

INTERIOR (e.g. plaster, not lined)

ROOF (e.g. iron, tiled)

Is there anything that may affect the value of the building (e.g. swimming pool, new kitchen, no off street parking)?

82 Is your property a farm/hobby farm?

No *Go to 89*

Yes *Go to next question*

83 What is the farm property primarily used for (e.g. grazing, wheat, hobby)?

84 Is the farm property currently operational/viable?

No

Yes

85 Is it possible to subdivide the farm property or farm home?

No

Yes

86 Are there any improvements on the farm property?

No Go to next question

Yes Give details below

Hay shed	Number	Age (years)
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Description		
<input type="text"/>		

Machinery shed	Number	Age (years)
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Description		
<input type="text"/>		

Shearing shed	Number	Age (years)
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Description		
<input type="text"/>		

Grain shed	Number	Age (years)
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Description		
<input type="text"/>		

Silos	Number	Age (years)
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Description		
<input type="text"/>		

Cattle/sheep yard	Number
<input type="checkbox"/>	<input type="text"/>
Description	
<input type="text"/>	

87 Is there any fencing on the property?

No Go to next question

Yes Give details below

Type and condition of fencing

88 Please list any other constructions located on the property (e.g. workers' quarters, manager's house)?

If you need more space, attach a separate sheet with details.

89 At the **relevant date**, did you (and/or your partner) own any motor vehicles, boats, caravans or trailers?

Note: The market value is the amount you would get if you sold the item, not the insured or replacement value.

No Go to next question

Yes Give details below

1 Make (e.g. Holden)	Model (e.g. Barina)
<input type="text"/>	<input type="text"/>
Year	Market value
<input type="text"/>	<input type="text"/>
Percentage owned by:	
You <input type="text"/> %	Your partner <input type="text"/> %

2 Make (e.g. Holden)	Model (e.g. Barina)
<input type="text"/>	<input type="text"/>
Year	Market value
<input type="text"/>	<input type="text"/>
Percentage owned by:	
You <input type="text"/> %	Your partner <input type="text"/> %

3 Make (e.g. Holden)	Model (e.g. Barina)
<input type="text"/>	<input type="text"/>
Year	Market value
<input type="text"/>	<input type="text"/>
Percentage owned by:	
You <input type="text"/> %	Your partner <input type="text"/> %

If you have more than 3 vehicles, attach a separate sheet with details.

90 At the **relevant date**, did you (and/or your partner) have any loans that the motor vehicles/boats/caravans or trailers were used as security?

No Go to next question

Yes Give details below

 Attach a copy of a statement showing the amount owing for each loan at the relevant date.

1 Details of the motor vehicles/boats/caravans or trailers secured by the loan

Amount owing

\$

2 Details of the motor vehicles/boats/caravans or trailers secured by the loan

Amount owing

\$

3 Details of the motor vehicles/boats/caravans or trailers secured by the loan

Amount owing

\$

If you have more than 3 vehicles, attach a separate sheet with details.

91 At the **relevant date**, did you (and/or your partner) have an interest in a business (this includes a farm)?

No Go to next question

Yes Give details below

What is your estimate of the total value of the interest in the business?

For a farming business, the value of grazing animals, produce, crops, plant and machinery should be included.

\$

 Attach a recent balance sheet which states your (and/or your partner's) current interest in the business.

92 At the **relevant date**, did you (and/or your partner) have any special collections such as stamps, art works or antiques?

No Go to next question

Yes Give details below

What is your estimate of the total value of these collections?

\$

 Attach copies of valuation certificates or insurance valuations (if available).

93 Give details below of all accounts held by you (and/or your partner) in banks, building societies or credit unions, at the **relevant date**.

Include savings accounts, cheque accounts, term deposits, joint accounts, accounts you hold in trust or under any other name, or money held in church or charitable development funds.

Accounts and term deposits outside Australia should be included, with the current balance in the type of currency in which it is invested. We will convert this into Australian dollars.

Do NOT include shares, managed investments or an account used exclusively for funding from the National Disability Insurance Scheme (NDIS).

 Attach proof of all account balances (e.g. ATM slip, statements, passbooks).

1 Name of bank, building society or credit union

Account number (this may not be your card number)

Type of account

Balance of account \$

Currency if not AUD

Your share % Partner's share %

2 Name of bank, building society or credit union

Account number (this may not be your card number)

Type of account

Balance of account \$

Currency if not AUD

Your share % Partner's share %

3 Name of bank, building society or credit union

Account number (this may not be your card number)

Type of account

Balance of account \$

Currency if not AUD

Your share % Partner's share %

4 Name of bank, building society or credit union

Account number (this may not be your card number)

Type of account

Balance of account \$

Currency if not AUD

Your share % Partner's share %

5 Name of bank, building society or credit union

Account number (this may not be your card number)

Type of account

Balance of account \$

Currency if not AUD

Your share % Partner's share %

If you (and/or your partner) have more than 5 accounts, attach a separate sheet with details.

94 At the **relevant date**, did you (and/or your partner) have any bonds or debentures?

Bonds refer to government and semi-government bonds.

Include:

- investments in and/or outside Australia

Bonds or debentures outside Australia should be included, with the current balance in the type of currency in which it is invested. We will convert this into Australian dollars.

Do NOT include:

- friendly society bonds, funeral bonds or life insurance bonds/investments
- aged care accommodation bonds or aged care fundable accommodation deposits.

No Go to next question

Yes Give details below



Attach a document which gives details for each bond or debenture.

1 Name of company

Type of investment

Current amount invested \$ Currency if not AUD

Your share % Partner's share %

2 Name of company

Type of investment

Current amount invested \$ Currency if not AUD

Your share % Partner's share %

3 Name of company

Type of investment

Current amount invested \$ Currency if not AUD

Your share % Partner's share %

If you (and/or your partner) have more than 3 bonds or debentures, attach a separate sheet with details.

95 At the **relevant date**, did you (and/or your partner) have money on loan to another person or organisation?

Include all loans, whether they are made to family members, other people or organisations or trusts.

No Go to next question

Yes Give details below

 Attach a document which gives details for each loan (if available).

1 Who did you lend the money to?

Date lent

Amount lent

 / /
 \$

Current balance of loan

Lent by you

Lent by your partner

 \$

 %

 %

2 Who did you lend the money to?

Date lent

Amount lent

 / /
 \$

Current balance of loan

Lent by you

Lent by your partner

 \$

 %

 %

If you (and/or your partner) have more than 2 loans, attach a separate sheet with details.

96 At the **relevant date**, did you (and/or your partner) have any managed investments in and/or outside Australia?

Include:

- investment trusts
- personal investment plans
- life insurance bonds
- friendly society bonds.

Do NOT include:

- conventional life insurance policies
- funeral bonds, superannuation or rollover investments.

APIR code – is commonly used by fund managers to identify individual financial products.

No Go to next question

Yes Give details below

 Attach a document which gives details (e.g. certificate with number of units or account balance) for each investment.

1 Name of company

Name of product
(e.g. investment trust)

Type of product/option
(e.g. balanced, growth)

Number of units

APIR code (if known)

Current market value

Currency if not AUD

 \$

Your share

 %

Partner's share

 %

2 Name of company

Name of product
(e.g. investment trust)

Type of product/option
(e.g. balanced, growth)

Number of units

APIR code (if known)

Current market value

Currency if not AUD

 \$

Your share

 %

Partner's share

 %

If you (and/or your partner) have more than 2 managed investments, attach a separate sheet with details.

97 At the **relevant date**, did you (and/or your partner) own any shares, options, rights, convertible notes or other securities **LISTED** on an Australian Stock Exchange (e.g. ASX, NSX, APX or Chi-X) or a stock exchange outside Australia?

Include shares traded in exempt stock markets.
Do NOT include managed investments.

No **Go to next question**

Yes **Give details below**

 Attach the latest statement for each share holding.

1 Name of company

Number of shares or other securities Code (if known)

Country if not Australia Your share Partner's share
 % %

2 Name of company

Number of shares or other securities Code (if known)

Country if not Australia Your share Partner's share
 % %

3 Name of company

Number of shares or other securities Code (if known)

Country if not Australia Your share Partner's share
 % %

If you (and/or your partner) have more than 3 share holdings, attach a separate sheet with details.

98 At the **relevant date**, did you (and/or your partner) have any funeral bonds/funeral investments?

No **Go to 100**

Yes **Give details below**

1 Name of company

Name of product

APIR code (if known) Purchase price incl. instalments but not interest
 \$

Current value as per latest statement Your share Partner's share
 \$ % %

2 Name of company

Name of product

APIR code (if known) Purchase price incl. instalments but not interest
 \$

Current value as per latest statement Your share Partner's share
 \$ % %

If you (and/or your partner) have more than 2 funeral bonds/funeral investments, attach a separate sheet with details.

99 Have you (and/or your partner) a contract to have funeral services provided for which an agreed sum has already been paid to the provider or used to buy funeral bonds assigned to the provider?

No **Go to next question**

Yes  Attach a copy of each investment.

100 Please read this before answering the following question.

You are considered to have an interest in a private trust if **any** of the following apply.

You (and/or your partner) are:

- the appointor
- guardian or principal of the trust, **or**
- a trustee

OR

- are a shareholder or director of the trustee company
- are a beneficiary or included amongst the categories of beneficiaries of the trust
- are a unit holder
- are owed money by the trust
- are able to benefit from the trust, **or**
- can expect the trustee or appointor of a trust to act in accordance with your wishes.

Have you (or your partner) had an interest in a private trust in the 5 years up to the **relevant date**?

No **Go to 102**

Yes Give details below
PT

What is your estimate of the total value of the interest at the relevant date?

\$

How much income was received from private trusts in the relevant date's financial year?

\$

101 Is the private trust a Special Disability Trust (SDT)?

No

Yes

102 Please read this before answering the following question.

You are considered to have an interest in a private company if **any** of the following apply.

You (and/or your partner):

- are a shareholder of the private company
- are a director or other office holder of the company
- are owed money by the company
- are able to benefit from the company
- can expect the director of a company to act in accordance with your wishes, **or**
- can expect the governing director or majority shareholder to act in accordance with your wishes.

Have you (or your partner) had an interest in a private company in the 5 years up to the **relevant date**?

No **Go to next question**

Yes Give details below
PC

What is your estimate of the total value of the interest at the relevant date?

\$

How much income was received from private companies in the relevant date's financial year?

\$

103 Do you (or your partner) have any money invested in superannuation where the fund is still in accumulation phase and not paying a pension?

Include:

- approved deposit funds
- deferred annuities
- retirement savings accounts
- Self Managed Superannuation Funds (SMSF) and Small APRA Funds (SAF) if the funds are complying.

No **Go to next question**

Yes Give details below

 Attach the latest statement for each superannuation investment.

1 Name of institution/fund manager

Name of fund

Account balance

\$

Amount that can be withdrawn as a lump sum (if any)

\$

Amount of income received

\$

How often (e.g. monthly)

per

Owned by: You Your partner

103 *Continued*

2 Name of institution/fund manager

Name of fund

Account balance	Amount that can be withdrawn as a lump sum (if any)
\$ <input type="text"/>	\$ <input type="text"/>
Amount of income received	How often (e.g. monthly)
\$ <input type="text"/>	per <input type="text"/>

Owned by: You Your partner

3 Name of institution/fund manager

Name of fund

Account balance	Amount that can be withdrawn as a lump sum (if any)
\$ <input type="text"/>	\$ <input type="text"/>
Amount of income received	How often (e.g. monthly)
\$ <input type="text"/>	per <input type="text"/>

Owned by: You Your partner

If you (and/or your partner) have more than 3 superannuation products, attach a separate sheet with details.

104 At the **relevant date**, did you (and/or your partner) have any life insurance policies that could be cashed in?

No **Go to next question**

Yes **Give details below**

 Attach a copy of the latest statement for each policy.

1 Name of product

Policy number

Number of units

Your share % Partner's share %

2 Name of product

Policy number

Number of units

Your share % Partner's share %

3 Name of product

Policy number

Number of units

Your share % Partner's share %

If you (and/or your partner) have more than 3 life insurance policies, attach a separate sheet with details.

105 Please read this before answering the following questions.

An **income stream product** is a regular series of payments which may be made for a lifetime or a fixed period by:

- a financial institution
- a superannuation fund
- a Self Managed Superannuation Fund (SMSF)
- a Small APRA Fund (SAF)
- an employer subject to Australian prudential regulations.

Types of income streams include:

- Allocated Pension (also known as Account Based Pension)
- Market-Linked Pension (also known as Term Allocated Pension)
- Annuities
- Defined Benefit Pension (e.g. ComSuper pension, State Super pension)
- Superannuation Pension (non-defined benefit).

At the **relevant date**, did you (and/or your partner) have any income stream products that were **purchased before 20 September 2007**?

No Go to next question

Yes Give details below

 You (and/or your partner) will need to attach a copy of the schedule for each product from your fund manager.

1 Name of institution/fund manager

 Name of fund

Account balance	Lump sum that can be withdrawn (if any)
\$ <input type="text"/>	\$ <input type="text"/>
Amount of income received	How often (e.g. monthly)
\$ <input type="text"/>	per <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

2 Name of institution/fund manager

 Name of fund

Account balance	Lump sum that can be withdrawn (if any)
\$ <input type="text"/>	\$ <input type="text"/>
Amount of income received	How often (e.g. monthly)
\$ <input type="text"/>	per <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

105 Continued

3 Name of institution/fund manager

 Name of fund

Account balance	Lump sum that can be withdrawn (if any)
\$ <input type="text"/>	\$ <input type="text"/>
Amount of income received	How often (e.g. monthly)
\$ <input type="text"/>	per <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

If you (and/or your partner) have more than 3 income stream products, attach a separate sheet with details.

106 At the **relevant date**, did you (and/or your partner) have any income stream products that were **purchased on or after 20 September 2007**?

No Go to next question

Yes Give details below

 You (and/or your partner) will need to attach a copy of the schedule for each product from your fund manager.

1 Name of institution/fund manager

 Name of fund

Account balance	Lump sum that can be withdrawn (if any)
\$ <input type="text"/>	\$ <input type="text"/>
Amount of income received	How often (e.g. monthly)
\$ <input type="text"/>	per <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

2 Name of institution/fund manager

 Name of fund

Account balance	Lump sum that can be withdrawn (if any)
\$ <input type="text"/>	\$ <input type="text"/>
Amount of income received	How often (e.g. monthly)
\$ <input type="text"/>	per <input type="text"/>
Your share <input type="text"/> %	Partner's share <input type="text"/> %

3 Name of institution/fund manager

Name of fund

Account balance
 \$

Amount of income received How often (e.g. monthly)
 \$ per

Your share % Partner's share %

If you (and/or your partner) have more than 3 income stream products, attach a separate sheet with details.

107 Have you (and/or your partner) given away, sold for less than their market value, or surrendered a right to any cash, assets, property or income at any time in the period starting from 5 years **before the relevant date**?

Include forgiven loans and shares in private companies.

No Go to next question

Yes Give details below

1 What you gave away or sold for less than its market value (e.g. money, car, second home, land, farm)

Date given or sold What it was worth
 / / \$

What you got for it Your share Partner's share
 \$ % %

Was this gift to a Special Disability Trust (SDT)? No Yes

2 What you gave away or sold for less than its market value (e.g. money, car, second home, land, farm)

Date given or sold What it was worth
 / / \$

What you got for it Your share Partner's share
 \$ % %

Was this gift to a Special Disability Trust (SDT)? No Yes

3 What you gave away or sold for less than its market value (e.g. money, car, second home, land, farm)

Date given or sold What it was worth
 / / \$

What you got for it Your share Partner's share
 \$ % %

Was this gift to a Special Disability Trust (SDT)? No Yes

If you (and/or your partner) have given away or sold for less than its market value more than 3 items, attach a separate sheet with details.

108 At the **relevant date**, did you (and/or your partner) have any other assets not already listed on this form?

Include cash, gold or other bullion.
Do NOT include real estate.

No Go to next question

Yes Give details below

 Attach supporting documentation.

1 Type of asset or investment

Estimated value of this asset or investment
 \$

2 Type of asset or investment

Estimated value of this asset or investment
 \$

3 Type of asset or investment

Estimated value of this asset or investment
 \$

4 Type of asset or investment

Estimated value of this asset or investment
 \$

If you (and/or your partner) have more than 4 other assets or investments, attach a separate sheet with details.

109 Please read this before answering the following questions.

You only need to complete questions 111 to 113 if you first entered residential aged care **BEFORE 1 July 2014**.

Note: You need to answer the questions 110 to 112 based on what your (and your partner's) debts are/were at the **relevant date**, refer to your answer at question 20.

Did you first enter residential aged care BEFORE 1 July 2014?

No **Go to 113**

Yes *Go to next question*

110 At the **relevant date**, did you (and/or your partner) owe any debts, for example loans and credit cards?

No **Go to 113**

Yes *Go to next question*

111 At the **relevant date**, did you (and/or your partner) have any outstanding credit card debts or other personal loans?

No *Go to next question*

Yes *Give details below*

 Attach a copy of a statement showing the amount owing for each loan at the **relevant date**.

1 Creditor

Amount owing	Your share	Partner's share
\$	%	%

2 Creditor

Amount owing	Your share	Partner's share
\$	%	%

3 Creditor

Amount owing	Your share	Partner's share
\$	%	%

If you (and/or your partner) have more than 3 outstanding debts, attach a separate sheet with details.

112 At the **relevant date**, did you (and/or your partner) have any other debts not already listed on this form (e.g. household and medical bills owing)?

No *Go to next question*

Yes *Give details below*

 Attach a copy of a statement showing the amount owing for each debt at the **relevant date**.

1 Creditor

Amount owing	Your share	Partner's share
\$	%	%

2 Creditor

Amount owing	Your share	Partner's share
\$	%	%

3 Creditor

Amount owing	Your share	Partner's share
\$	%	%

If you (and/or your partner) have more than 3 other debts, attach a separate sheet with details.

119 Do you (and/or your partner) receive payments from an authority or agency outside Australia at the **relevant date**?

Include pensions from other countries, benefits, allowances, superannuation, compensation and war related payments.

Note: You must include details of pensions, allowances and other payments even if they are not taxable in the country of payment.

No Go to next question

Yes Give details below

 Attach a document from the issuing authority or agency which gives details including the amount in the foreign currency (e.g. latest pension certificate) for each payment.

1 Type of payment

Country which pays it?

Amount paid
(before tax or deductions) Currency if not AUD

Paid to: You Your partner

2 Type of payment

Country which pays it?

Amount paid
(before tax or deductions) Currency if not AUD

Paid to: You Your partner

3 Type of payment

Country which pays it?

Amount paid
(before tax or deductions) Currency if not AUD

Paid to: You Your partner

If you (and/or your partner) receive more than 3 payments from an authority or agency outside Australia, attach a separate sheet with details.

120 Do you (and/or your partner) receive any income from a business partnership, a farm or from operating as a sole trader?

No Go to next question

Yes Amount received in the last financial year

\$



You will need to attach:

- your (and/or your partner's) latest personal income tax return(s), **and**
- business income tax return for the last financial year, **and**
- a profit and loss statement, depreciation schedule and any other explanatory notes which form part of the accounts of the business or company.

121 Do you (and/or your partner) receive any other income at the **relevant date** that you have not already listed on this form?

Include income or money from:

- work
- regular compensation payments or damages
- income protection insurance
- life interests
- gratuities
- other Australian government departments
- other payments from outside Australia
- money from a Home Equity Conversion loan
- income from boarders and lodgers
- other income.

Do NOT include for you (and/or your partner and/or your child(ren)) funding from the National Disability Insurance Scheme (NDIS).

No Go to next question

Yes Give details below

 Attach a copy of documentation giving details of the type and the amount of the payment.

1 Type of income

Amount received

\$ per

2 Type of income

Amount received

\$ per

3 Type of income

Amount received

\$ per

If you (and/or your partner) need more space, attach a separate sheet with details.

Nominee details

122 Please read this before answering the following question.

You may authorise another person (a 'nominee') to act on your behalf to deal with aged care matters.

You may vary or cancel the appointment of a nominee at any time.

If you decide not to appoint a nominee, you will be contacted directly about these matters.

Note: If your nominee does not hold a Power of Attorney or similar, both you and your nominee will receive letters from us.

Do you want to authorise another person or organisation to be your nominee?

No Go to 143

Yes Go to next question

123 Is this authorisation for a person or organisation?

Tick ONE box only

Authorise a PERSON Go to next question

Authorise an ORGANISATION Go to 127

124 Your authorised person's name

Mr Mrs Miss Ms Other

Family name

First given name

Second given name

125 Your authorised person's date of birth

/ /

126 Your authorised person's Centrelink Reference Number (if known)

- - -

Go to 128

127 Your nominated organisation's details

Trading name of organisation

This is the name of the organisation, not the contact person. The contact person can be identified below.

Business name of organisation

Australian Business Number (ABN)

ABN is mandatory to access online services.

Organisation Centrelink Reference Number

Name of contact person

128 What is their relationship to you (e.g. father, sister, guardian, administrator, Public Trustee)?

129 Your authorised person's contact details

Street address

Postcode

Postal address (if different to above)

Postcode

Phone number

Fax number

Mobile number

Email

130 Do you receive an income support payment from Centrelink?

For more information, refer to *What is an income support payment?* in the **Information Booklet**.

No Go to next question

Yes Go to 135

131 Do you receive an income support payment or a War Widows Pension from the Department of Veterans' Affairs?

For more information, refer to *What is an income support payment?* in the **Information Booklet**.

No Go to next question

Yes Go to 133

132 Do you receive a Disability Pension from the Department of Veterans' Affairs and have qualifying service?

No Go to 136

Yes Go to 139

133 What type of actions are you authorising for your nominee?

Tick ALL that apply

To give information about your assets and income to the Department of Veterans' Affairs.

To discuss your payment with the Department of Veterans' Affairs.

To enquire and receive information about your aged care costs.

134 How long do you want this arrangement to last?

For this means test assessment only

Indefinitely

135 Does the nominee hold any of the following forms of authorisation on behalf of the resident:

- Power of Attorney
- Court, Tribunal, Guardianship or Administration Order

No Go to next question

Yes Give details below

 Attach a certified copy of the relevant authorisation.

Go to 140

136 What is the arrangement you are authorising?

For more information, refer to *Authorised person* in the **Information Booklet** if you are not sure about which arrangement you wish to make.

Person Permitted to Enquire Go to 138

Authorise a person to make an enquiry only on your behalf about aged care **and** income support matters

Correspondence Nominee Go to next question

Authorise a person to enquire, act and make changes on your behalf about aged care **and** income support matters

137 Nominee's password

The nominee MUST provide a password to be used when contacting us. The password needs to have 4 to 12 letters or numbers. Please remember the password.

138 What is the arrangement you are authorising?

Voluntary **Go to next question**

Power of Attorney

Court, Tribunal, Guardianship or Administration Order

 Attach supporting documents.

139 How long do you want this arrangement to last?

Indefinitely **OR**

From / / to / /

140 Your authorisation

If unable to sign, go to next question

I authorise the person named on this form to deal with the Department of Human Services and the Department of Veterans' Affairs on my behalf according to the arrangements shown on this form.

Your signature



Date

141 Third party authorisation

The person signing this form on behalf of the customer cannot be a nominee authorised on this form, unless it is a court appointed arrangement.

 You will need to provide evidence of the customer's inability to sign if it is not a court appointed arrangement.

Name of person signing on behalf of the customer

Relationship to customer

Address

Postcode

Contact phone number

Signature of the person signing on behalf of the customer



Date

142 Nominee's acceptance

Important information: Check to make sure that your personal and/or organisation details are correct.

For a Department of Human Services customer, check you have provided a password at question 137.

I declare that:

- I accept the responsibilities and obligations for the arrangement for which I am authorised.

I declare and accept that:

- any personal information I am given access to under this arrangement is protected under Commonwealth legislation. I agree to access, use or disclose the information only as authorised by the person to whom the information relates.
- my appointment as a nominee under Commonwealth legislation may be revoked or suspended by the Department of Human Services or the Department of Veterans' Affairs should I not comply with my responsibilities and obligations.

Signature of the nominee

Date

Questions continue ►

143 Which of the following forms, documents and other attachments are you (and/or your partner) providing with this form?

If you are not sure, check the question to see if you should attach the documents.

- Documentation with details of the sale of your home such as solicitor's settlement letter
*(If required at **question 25**)*
- Documentation with details on the transfer of title
*(If required at **question 26**)*
- Accommodation payment agreement
*(If required at **question 27**)*
- Documentation with details on value of mobile home/caravan/boat or refundable entry contributions
*(If required at **question 33 or 43**)*
- Documentation with details on loan secured by home
*(If you answered Yes at **question 34 or 44**)*
- Documentation with details on amount owing for each property
*(If you answered Yes at **question 54 or 80**)*
- Details requested for each additional property
*(If required at **question 73**)*
- Documentation with details on amount owing for each loan secured by vehicles
*(If you answered Yes at **question 90**)*
- Recent balance sheet stating current interest in the business
*(If you answered Yes at **question 91**)*
- Valuation certificates or insurance certificates
*(If you answered Yes at **question 92**)*
- Documents showing balances for bank, building society and credit union accounts
*(if required for **question 93**)*
- Investment bond/debenture documents
*(If you answered Yes at **question 94**)*
- Money on loan documents (if available)
*(If you answered Yes at **question 95**)*
- Managed investment certificates or similar documents
*(If you answered Yes at **question 96**)*
- Share certificates or latest statement for each shareholding LISTED on a stock exchange
*(If you answered Yes at **question 97**)*
- Funeral bond contract(s)
*(If you answered Yes at **question 99**)*
- Latest superannuation statements for each fund
*(If you answered Yes at **question 103**)*
- Latest statement for each life insurance policy
*(If you answered Yes at **question 104**)*
- Latest schedules for income stream products
*(If you answered Yes at **question 105 or 106**)*

- Documentation with details on 'other assets'
*(If you answered Yes at **question 108**)*
- Documentation with details on credit card debts or debts, or other personal loans
*(If you answered Yes at **question 111 or 112**)*
- Documentation with details on rental income
*(If you answered Yes at **question 115**)*
- Documents with details of payments by authorities or agencies outside Australia
*(If you answered Yes at **question 119**)*
- Latest personal income tax return(s), business income tax return, a profit and loss statement, depreciation schedule and any other explanatory notes
*(If you answered Yes at **question 120**)*
- Documents with details on 'other' income
*(If you answered Yes at **question 121**)*
- Verification that another person is authorised to act on your behalf
*(If you answered Yes at **question 135** or if required at **138**)*
- Verification that a third person is authorised to sign for you
*(If required at **question 141**)*

144 Please read this before continuing.

Make sure you have read the **Privacy and your personal information** on page 2 of this claim.

If you (the aged care recipient) are unable to sign this statement, it should be signed by someone who is authorised to sign on your behalf.

I consent to:

- the Department of Social Services providing the Australian Government Department of Human Services and the Department of Veterans' Affairs with information about periods, types and levels of care, and previous aged care assets and income assessments, in relation to my current and/or any previous periods of aged care, if required to complete my assets and/or income assessment.
- the Australian Government Department of Human Services and the Department of Veterans' Affairs:
 - using information which has been collected from me for the purpose of determining my eligibility for an income support payment, for the additional purposes of completing my aged care assets and/or income assessment under the *Aged Care Act 1997* to determine the amount of subsidy payable to aged care homes and the maximum amount I could be asked to pay a home for accommodation and/or as a means tested care fee.
 - using information collected from me for the purpose of completing my aged care assets and/or income assessment for the additional purpose of updating information held by the Australian Government Department of Human Services and the Department of Veterans' Affairs in relation to my eligibility for an income support payment.
 - disclosing personal information about me to my nominee and/or person permitted to enquire (if any).
 - disclosing information collected from me for the purpose of completing my aged care assets and/or income assessment to the Department of Social Services and the Australian Government Department of Human Services (acting on behalf of the Department of Social Services) in order to calculate the amount of subsidy payable to aged care homes and the maximum amount I could be asked to pay a home for accommodation and/or as a means tested care fee and any financial hardship assistance (if applicable).
 - advising aged care homes, to which I have applied for care, of the progress of my assets and/or income assessment if they request this information from the Australian Government Department of Human Services and the Department of Veterans' Affairs. My consent does not include advising aged care homes about the outcome of my assessment.

144 Continued**I declare that:**

- the information I have provided in this form is complete and correct.

I understand that:

- giving false or misleading information is a serious offence.

Signature of aged care recipient
(or the person signing on their behalf)



Date

/
/

► For the **person signing on behalf** of the aged care recipient continue to next page.

145 If someone signs on your behalf

This person cannot be the person appointed as the contact person UNLESS they are the aged care recipient's legal guardian or they hold the power of attorney for the aged care recipient.

Mr Mrs Miss Ms Other

Family name

First given name

Second given name

Address

 Postcode

Daytime phone number ()

Mobile number

Relationship to the aged care recipient

Which of the following documents are you providing with this form?

A copy of the power of attorney order

A copy of the administration order

A copy of the financial management order

Make sure you have read the **Privacy and your personal information** on page 2 of this claim. If you wish to be registered as a power of attorney for future contacts with the Department of Veterans' Affairs, please provide a certified copy of your Power of Attorney documentation.

Legal guardian's or power of attorney's signature

Date / /

When 2 people have power of attorney, the second person with power of attorney also needs to sign.

Second power of attorney's signature

Date / /

OFFICE USE ONLY
CRN - - -
Centrelink date of receipt