

INDIVIDUALS TRANSITIONING TO AGED-CARE FACILITIES

Planning Partners provides advice to the families of people who are considering moving into an Aged-Care facility. This service covers advice in the following areas:

AGE PENSION ADVICE:

We have expertise in Centrelink rules and devise strategies to maximise your income to provide you with greater financial security. Where required, we can liaise with Centrelink on your behalf.

ADVICE REGARDING SALE OR RENTAL OF FAMILY HOME:

This is generally the most difficult decision facing individuals moving to Aged-Care facilities. We analyse the financial implications of your preferences and can advise you of a recommended course of action.

CHOICE OF AGED CARE FACILITIES:

We have specialist knowledge of the financial implications of entering different types of facilities (eg. Retirement Villages, Low-level and High-level care) and provide you with peace-of-mind in reaching an appropriate decision.

PORTFOLIO MANAGEMENT:

We provide portfolio advice on a wide range of investments including direct equities, professionally- managed funds and fixed-interest investments. We also provide access to a custodial facility to minimise the administration costs associated with your investments.

ESTATE PLANNING:

We provide comprehensive advice to ensure that your assets are protected and distributed in accordance with your wishes upon death. We work in conjunction with Estate Planning solicitors who prepare formal documents including Wills and Powers-of-Attorney.



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The information on this website does not take into account the objectives, financial situation or needs of any particular person. Before making an investment decision you should consult with your financial advisor and consider whether it is appropriate in light of your particular objectives, financial situation and needs.

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