

Online account



Completing this form online is faster and easier.

Access your Centrelink online account through myGov. Select **Payments and claims**, then **Claims and Make a claim**.

If you do not have a myGov account, you can create one at my.gov.au and then link Centrelink to it. Do not complete this form online if you receive a Department of Veterans' Affairs means tested income support payment. For more information, call DVA on 1800 VETERAN (1800 838 372).

About this form



We understand that entering into aged care can be a sensitive time.

If you are entering residential aged care, the Australian Government may subsidise your aged care fees. **This form collects details of your income and assets so we can calculate the amount you will pay towards your residential aged care.**

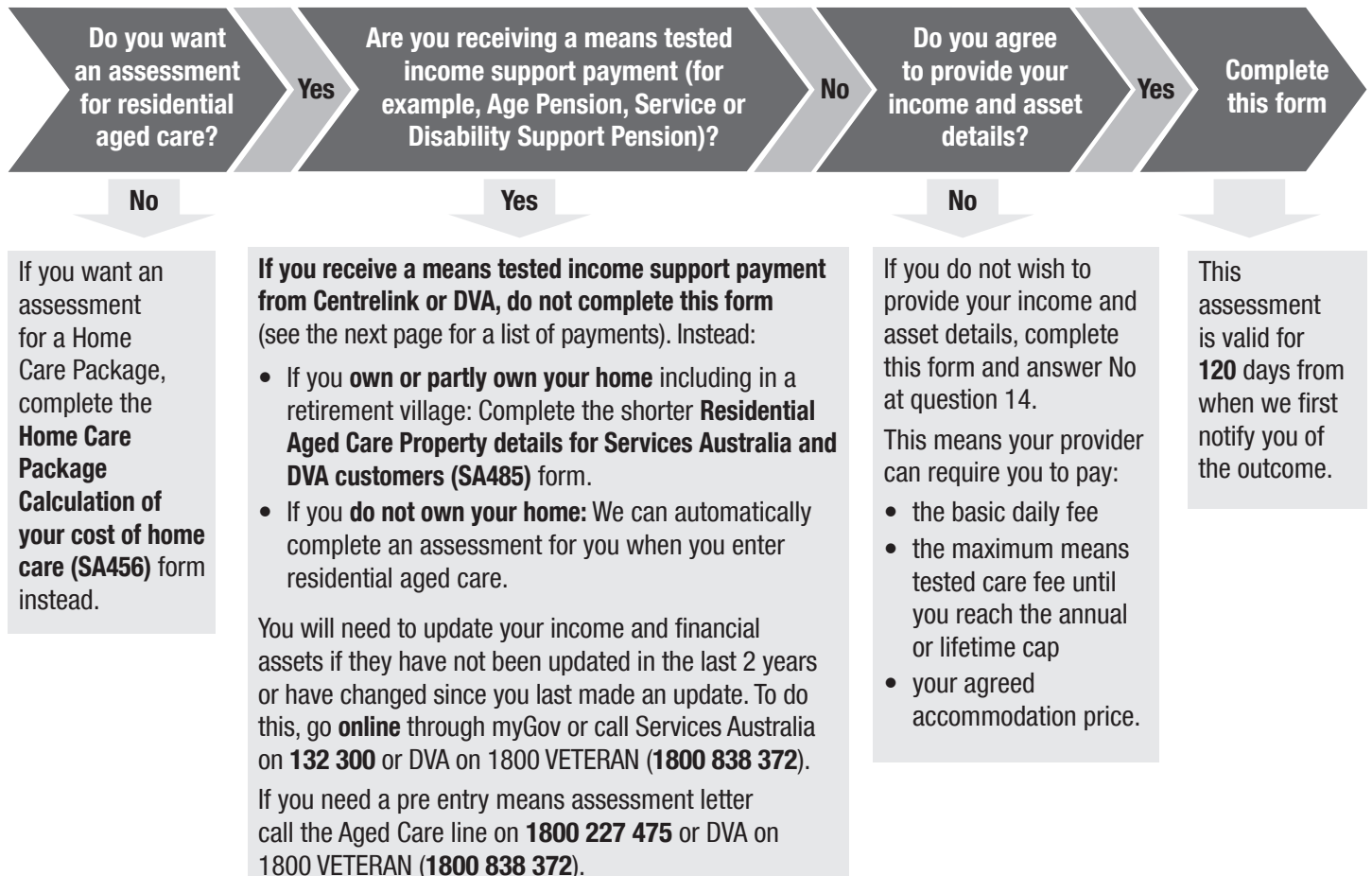
Other help available

We have **Aged Care Specialist Officers (ACSOs)** who provide in-depth information about your aged care option, including financial aspects of aged care. Go to servicesaustralia.gov.au/myagedcarefacetoface or call us on **1800 227 475** to find out if there is an ACSO near you, and to book an appointment. Staff in our service centres can also help you with general aged care information.

You can speak to a **Financial Information Service Officer (FISO)** who can help you understand your financial choices. Call us on **132 300** and say **Financial Information Service** when we ask why you are calling. For more information, go to servicesaustralia.gov.au/fis

From 1 January 2025, payments under the **National Redress Scheme** can be exempt from residential age care means tests when self-disclosed. For more information, go to nationalredress.gov.au

When to use this form



Keep these Notes (pages 1 to 6) for your information.

Fee estimator

You can get an estimate of the amount you may be asked to pay towards your residential aged care by going to myagedcare.gov.au and searching for **fee estimator**.

For more information



Go to servicesaustralia.gov.au/agedcare or call us on **1800 227 475**.

Information in your language

We can translate documents you need to give us for free.

To speak to us in your language, call us on **131 202**.



Hearing and speech assistance

If you have a hearing or speech impairment, you can use:

- the National Relay Service **1800 555 660**, or
- our TTY service on **1800 810 586**. You need a TTY phone to use this service.

For more information about help with communication, go to servicesaustralia.gov.au and search 'other support and advice'.

The information below will help you answer questions in this form.

Calculating your cost of care

All aged care residents may be asked to pay a basic daily fee. In addition, some residents may also be required to pay a means tested care fee.

This form is used to calculate the amount you will pay towards your cost of care.

There are annual and lifetime caps that apply to the means tested care fee for residents who entered residential aged care on or after 1 July 2014. Services Australia will write to you and your service provider once you have reached the annual or lifetime cap.

Some residents will have their accommodation costs paid in full or in part by the Australian Government. Others will need to pay the accommodation cost they negotiate with their residential aged care provider.

The collection of your (and/or your partner's) personal information on this form, for the purposes of calculating your cost of care is voluntary.

Services Australia collects this information to undertake assessments to determine the fees payable by care recipients, and government subsidies payable to approved aged care service providers, under the *Aged Care Act 1997*.

Without this information the care recipient will pay the maximum fees. All information collected by Services Australia can be accessed:

- through your Centrelink online account by signing in to myGov
- by calling the Aged Care line on **1800 227 475** or DVA on 1800 VETERAN (**1800 838 372**).

Services Australia only shares information with other parties where you have agreed, or where the law allows or requires it. For more information, go to servicesaustralia.gov.au/privacypolicy

Centrelink or Department of Veterans' Affairs payments

Non-means tested payments may include:

- Age Pension (Blind)
- Disability Support Pension (Blind)
- War Widow(er)s Pension
- Disability Compensation Payment paid by DVA (not including Income Support Supplement)
- Service Pension (Blind) paid by DVA.

Means tested payments may include:

- Age Pension
- Disability Support Pension
- Carer Payment (not including Carer Allowance)
- Special Benefit
- Service Pension
- Income Support Supplement
- Veterans Payment
- Farm Household Allowance.

Who should complete this form?

If you are not receiving a Centrelink or DVA payment OR you are receiving a Centrelink or DVA **non-means** tested payment listed above, you will need to complete this form if you want us to calculate your income tested cost of care. If you do not complete this form, your cost of care will not be adjusted to reflect your income.

Who should *not* complete this form?

Do not complete this form if you are receiving one of the **means tested** payments from Centrelink or DVA listed above, and:

- you do not own your home, and
- you have updated your records within the last 2 years, or
- your assets and income have not changed since you last provided an update.

We have enough information about you to complete your assessment.

Continued

You will need to update your income and financial assets if they have not been updated in the last 2 years or have changed since you last made an update. To do this, go **online** through myGov or call Services Australia on **132 300** or DVA on 1800 VETERAN (**1800 838 372**).

If you are receiving one of the Centrelink or DVA **means tested** payments listed on page 3 of the **Notes** and you own or partly own your home (including in a retirement village), **do not** complete this form. You will need to complete the shorter **Residential Aged Care Property details for Services Australia and DVA customers (SA485)** form, as we need to collect information about your home to complete your assessment.

If you do not have this form, go to **servicesaustralia.gov.au/forms**

Protected person for aged care purposes

For aged care legislation purposes, a protected person is:

- your partner or dependent child
- your carer¹ who is eligible to receive an Australian Government income support payment and who has lived in your home with you for the past 2 years
- your close relative who is eligible to receive an Australian Government income support payment and who has lived in your home with you for the past 5 years.

If your home is occupied by a protected person, it may not be counted as an asset for aged care purposes.

Your carer or close relative will need to give their consent in this form to allow Services Australia or DVA to check their eligibility for an income support payment.

This exemption may be lost if the protected person who has been living in the home, moves out of the home or loses their eligibility for their income support payment.

¹ It is not necessary for your carer to have received a Carer Payment or Carer Allowance in order to be considered a carer. However, at the date you enter care or complete this form your carer must meet the eligibility criteria for an Australian Government income support payment (notionally entitled person).

Assets for the purposes of aged care

An asset is any property or item of value you (and/or your partner) own, or have an interest in, including those held outside Australia. Examples include real estate, shares, household contents and personal effects.

If you are a member of a couple, you are deemed to own half of the total combined assets, regardless of whose name these are held in.

If you enter residential aged care on or after 1 July 2014, and your home is not occupied by a protected person, it will be counted as an asset. However, the amount of the home included as an asset will be capped.

If your home is counted as an asset, you do not need to have it professionally valued. If required we will verify the estimated value of the property at no cost to you.

If you have made a gift, the limit you are able to give away is \$10,000 in the previous 12 months or \$30,000 in the previous 5 years – this cannot include more than \$10,000 in any year. Gifts over these amounts will be considered an asset that is deemed to be earning income in your assessment.

Remove this Notes booklet from the form if you have not already done so.

Income for the purposes of aged care

Income, for the purposes of aged care, is not the same as taxable income. Your assessed income includes:

- income from work
- income support payments from the Australian Government, such as the Age Pension, a Service Pension or an Income Support Supplement
- income from financial investments
- net income from rental properties
- some payments paid by the Department of Veterans' Affairs
- net income from businesses, including farms
- superannuation and overseas pensions, income from income stream products such as annuities and allocated pensions
- family trust distributions or dividends from private company shares
- income from outside Australia.

If you have a partner, you will be asked to answer questions about your combined income. Your income will be assessed as half of the total combined income, regardless of whose name it is in.

Financial investments deemed to be earning income include bank accounts and other financial investments. It is important you tell us about all the bank accounts and financial investments you (and/or your partner) have no matter what income they are actually earning.

Money or assets that you (and/or your partner) have given away in the last 5 years, may be considered to earn income.

Retirement villages or independent living units

Retirement villages or independent living units are not residential aged care homes and are not subsidised by the Australian Government. A retirement village provides accommodation for retirees (55 years or older). Independent living units are a housing option for older people who want to live independently.

Residents of retirement villages or those living in independent living units generally enter into an agreement that outlines how much they will pay to enter and the amount (if any) refundable after they leave. Following departure the amount refundable may be subject to this assessment.

Changes you should tell us about

You should tell us if:

- you marry, are in or start a registered or de facto relationship, reconcile with a former partner, start living with someone as their partner
- you separate from your partner
- your partner dies
- your (or your partner's) financial circumstances change
- your protected person details have changed
- a dependent child or student either enters or leaves your care
- the status of your family home changes, for example, you sell your home.

Changes such as these may affect the amount of pension you receive or the aged care fees you may be asked to pay.

To advise us of changes, call us on **1800 227 475** or DVA on **133 254**.

Person signing on your behalf

This form must be signed by the person the application is for or someone who is authorised to sign on their behalf. An authorised person may be an Enduring Power of Attorney, Power of Attorney (financial), or a person/organisation holding an administrative or financial order. You **must** provide photo identification for **all** signing guardians and attorneys.

A person can apply for an assessment for the cost of care on behalf of someone else if:

- they are already acting as the person's nominee
- they hold a power of attorney or guardianship order
- a letter from a doctor, nurse or similar health professional is provided stating that the customer is unable to sign the application form
- the application is made by the Director of Nursing at the aged care home where the customer is a resident.

Where the person is deceased only the executor of the will or a person holding letters of administration is authorised to sign on behalf of their estate.

Identity requirements

Power of Attorney or authorised person

The **Power of Attorney** or **authorised person** of the customer will need to provide photo identification in person at one of our service centres, agents or access points to have their identity verified. For example, a current Australian driver licence or valid passport can be provided – for a full list, go to servicesaustralia.gov.au/identity

Authorised organisation staff

Staff from your authorised organisation will need to verify their identity details when they create their Provider Digital Access (PRODA) account to access nominee online services. For more information, go to servicesaustralia.gov.au/proda

Authorising a person or organisation to enquire or act on your behalf

You can authorise a person or organisation to enquire or act on your behalf for aged care purposes. You will need to complete the **Authorising a person or organisation to enquire or act on your behalf (SS313)** form at the back of this form and return it separately. If you want more information about nominee arrangements, go to servicesaustralia.gov.au/authorisedrepresentative or call us on **1800 227 475**.

If you are receiving a DVA means tested payment (see **Notes** page 3) complete the **Aged Care Request for a nominee for Department of Veterans' Affairs customers (AC019)** form by going to servicesaustralia.gov.au/forms

For information about the DVA authorised person arrangements, call DVA on 1800 VETERAN (1800 838 372).

Keep these Notes (pages 1 to 6) for your information.

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Residential Aged Care Calculation of your cost of care (SA457)

Filling in this form

- Use black or blue pen.
- Print in BLOCK LETTERS.
- Where you see a box like this Go to 1 skip to the question number shown.


You will see **entry/application date** in many of the questions in this form. An explanation of what each term means and what we need from you is below.

Entry date – If you are permanently living in an aged care home, you need to answer the questions and provide the documentation based on your date of entry into the home. For example, if you permanently moved into an aged care home on 10 January 2019, you need to provide supporting documents that show what your income and assets were on 10 January 2019.

Application date – If you have not moved into an aged care home, you need to answer the questions and provide supporting documentation based on your current situation. For example, if you submitted the form on 1 January 2019, you need to provide supporting documents that show what your income and assets were on 1 January 2019.

1 Why do you want an assessment?

For residential Go to next question
aged care

A Home Care  Do not complete this form.
Package See 'When to use this form' on
page 1 of the **Notes**.

2 Do you receive a means tested income support payment from Centrelink or DVA?

For a list of means tested payments, refer to 'Centrelink or Department of Veterans' Affairs payments', on page 3 of the **Notes**.

No Go to next question

Yes  Do not complete this form. See 'When to use this form' on page 1 of the **Notes**.

3 Are you completing this form on behalf of someone else?

For example, partner, parent or relative.

No Go to next question

Yes Give details below

Your full name

Your relationship to the person the assessment is for

If you wish to be listed as a nominee for aged care purposes, you and/or the person this assessment is for will need to complete the nominee section at the back of this form. We may contact nominees about this assessment.

4 Do you (the person who the assessment is for) have a partner?

In this form we will collect information about your partner. If your partner would like an assessment, they need to complete a separate assessment form.

For this assessment, a partner can be either:

- a person you are legally married to, or who you were living with in a de facto relationship, but are now living apart on a permanent basis due to a **health related reason**, for example, if the person entered residential aged care
- a person you are legally married to, and normally live with on a permanent basis
- a person who lives with you in a de facto relationship, although you are not legally married to that person
- a person in a registered relationship.

No Go to next question

Yes We will ask basic information about your partner.

If your partner would like an assessment, they need to complete a separate SA457 assessment form.

▶ Go to next question



CLK0SA457 2501

You (the person the assessment is for)

10 Have you been known by any other name(s)?

Include:

- name at birth
- name before marriage
- previous married name
- Aboriginal or skin name
- alias
- adoptive name
- foster name.

No Go to next question

Yes Give details below

1 Other name

Type of name (for example, name at birth)

2 Other name

Type of name (for example, name before marriage)

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

11 **Read** this before answering the following question.

Providing a mobile phone number or an email address means you may receive SMS or emails from us. To read the terms and conditions, go to servicesaustralia.gov.au/em

Your contact details

Phone number (including area code)

Email

12 What is your current address, including if you are in residential aged care?

Postcode

13 Postal address if different to current address

Postcode

Your partner (of the person the assessment is for)

10 Has your partner been known by any other name(s)?

Include:

- name at birth
- name before marriage
- previous married name
- Aboriginal or skin name
- alias
- adoptive name
- foster name.

No Go to next question

Yes Give details below

1 Other name

Type of name (for example, name at birth)

2 Other name

Type of name (for example, name before marriage)

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

11 **Read** this before answering the following question.

Providing a mobile phone number or an email address means you may receive SMS or emails from us. To read the terms and conditions, go to servicesaustralia.gov.au/em

Your partner's contact details

Phone number (including area code)

Email

12 Your partner's home address

Postcode

13 Your partner's postal address if different to home address

Postcode

Your assessment

- 14** Do you want to provide your and your partner's (if applicable) income and financial assets details so we can calculate your cost of care?

No You will pay the maximum residential care fees until you reach the annual or lifetime cap.

This means that your provider can require you to pay the **basic daily fee, maximum means tested care fee and accommodation cost.**

▶ **Go to 71**

Yes You are giving us permission to use your and your partner's (if applicable) personal information and to disclose it to the:

- Department of Social Services for social security purposes, including to update information about your income and financial assets
- Department of Veterans' Affairs for purposes including determining responsibility for calculation and payment of subsidies under the *Aged Care Act 1997*, and
- Department of Health and Aged Care for purposes including reporting, developing aged care policy and investigating aged care fees and payment issues.

▶ **Go to next question**

- 15** Have you (and/or your partner) received a redress payment?

No **Go to 18**

Yes **Go to next question**

- 16** **Read** this before answering the following questions.

You (and/or your partner) have the option to self-disclose a redress payment from the date of receipt to have it exempt from the aged care means test.

Do you (and/or your partner) want to disclose a redress payment to be exempt from your aged care means test?

No **Go to 18**

Yes **Go to next question**


- 17** When did you (and/or your partner) receive the redress upfront lump sum payment or first instalment?

You
(DD MM YYYY)

Total redress payment amount \$

Your partner (if applicable)
(DD MM YYYY)

Total redress payment amount \$

 Provide evidence of a payment made under the National Redress Scheme, for example, your 'Payment from the National Redress Scheme – NRS049' letter.

- 18** Why do you want this assessment?

The entry/application date is the date you entered care or the date you submitted this form.

Tick one only

Option 1: You are planning on going into residential aged care

Answer the questions in this form and provide supporting documentation based on your current situation.

We will use the date you submit the form as the **application date.**

Go to 19

Option 2: You are now or were in residential aged care

Answer the questions in this form and provide supporting documentation based on your situation at the date of **entering residential aged care.**

Residential aged care start date
(DD MM YYYY)

Go to 19

Option 3: You entered residential aged care before 1 July 2014

You are a residential aged care home resident who was already in permanent residential care **before 1 July 2014** and are thinking of having an assessment done under the current means testing rules as you are considering changing aged care provider.

You will need to call us on 1800 227 475.

- 19** **Read** this before answering the following question.

If you tick yes to having a partner living in your family home on entry application, it may not be counted as an asset for aged care purposes. This exemption may be lost if the person moves out of the home. Tell Services Australia or DVA if this occurs as your fees and charges may change. For more information, see 'Protected person for aged care services' on page 4 of the **Notes.**

At the entry/application date did your partner live in the family home?

No

Yes

25 Have you (and/or your partner) sold your former home within the last 24 months and intend to buy or build a new family home?

No Go to next question


Yes Give details below

What was the date of settlement?

(DD MM YYYY)

What was the amount you received after any mortgage and costs were taken out of the sale price?

\$

 Provide documents to verify the details of the sale (for example, settlement statement). Copies are acceptable.

What is the total amount you (and/or your partner) intend to use to buy or build your new family home (cannot exceed the amount of the sale proceeds)?

\$

If you are a member of a couple, what share of the intended amount do you and your partner each have invested?

You

Your partner

\$

\$

Expected date of purchase or completion of your new family home

(DD MM YYYY)


26 At the entry/application date, was your home a:

- retirement village unit
- mobile home or motor home
- caravan
- boat?

No Go to next question

Yes Give details below

| | |
|---|---|
| Type of asset | |
| <input type="text"/> | |
| Estimated market value | Balance of loan(s) |
| \$ <input type="text"/> | \$ <input type="text"/> |
| Who owns your home? | |
| Your share <input type="text"/> % | Your partner's share <input type="text"/> % |
| Other's share <input type="text"/> % | |
| Do you have a partner who is/was living in your home at the entry/application date? | |
| No <input type="checkbox"/> Go to 32 | |
| Yes <input type="checkbox"/> Go to 32 | |

 Provide documentation on the value of the mobile home/caravan/boat, refundable entry contributions or property. Provide a copy of a statement showing the amount owing for any loans.

27 What type of property is your home:

House

Townhouse (including duplex/triplex)

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

Unit/flat

How many units/flats are in the block?

Part of a farming property

Other Give details below

.....

28 Select the **option** that applies to you and answer the questions based on the entry/application date:

Option 1: Small property, suburban block or apartment/unit

My home is on land up to and including 5 acres (2 hectares) Give details below

| | |
|---|---|
| Estimate the market value of your property including the buildings | Balance of loan(s) for your property |
| \$ <input type="text"/> | \$ <input type="text"/> |
| Who owns your home as shown on the property title? | |
| Your share <input type="text"/> % | Your partner's share <input type="text"/> % |
| Other's share <input type="text"/> % | |
| Do you have a partner who is/was living in your home at the entry/application date? | |
| No <input type="checkbox"/> Go to 29 | |
| Yes <input type="checkbox"/> Go to 32 | |

If you have a mortgage, provide a copy of a statement showing the amount owing for each mortgage.

Option 2: Large property or large suburban block

My home is on land over 5 acres (2 hectares) Give details below

For example, if your home is on a 20 acre property, provide separate estimated values for the home and the first 5 acres of land in the first box, and the remaining 15 acres in the second box.

| | |
|---|--|
| Estimate the market value of the first 5 acres of your property including the buildings | Estimate the market value of the remaining acreage |
| \$ <input type="text"/> | \$ <input type="text"/> |
| Balance of loan(s) for your property | |
| \$ <input type="text"/> | |
| Who owns your home as shown on the property title? | |
| Your share <input type="text"/> % | Your partner's share <input type="text"/> % |
| Other's share <input type="text"/> % | |
| Do you have a partner who is/was living in your home at the entry/application date? | |
| No <input type="checkbox"/> Go to 29 | |
| Yes <input type="checkbox"/> Go to 29 | |

If you have a mortgage, provide a copy of a statement showing the amount owing for each mortgage.

29 What is the legal description of the property (for example, lot, section, parish)?

This information can be found on a rates notice. If the property is made up of more than one title, provide details for each separate title.

| |
|--|
| |
| |
| |
| |

Provide a copy of the council rates notice.

30 What is the area or dimension of the property?

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

31 What type of buildings are on the property?

This information will help us to value the property.

| | |
|---|--------------------------|
| 1 What is the approximate floor area in square metres? | How old is the building? |
| <input type="text"/> | <input type="text"/> |
| Type of construction | |
| Exterior (for example, brick, timber) | |
| <input type="text"/> | |
| Interior (for example, plaster, not lined) | |
| <input type="text"/> | |
| Roof (for example, iron, tiled) | |
| <input type="text"/> | |
| General condition (for example, fair, good, poor) | |
| <input type="text"/> | |
| Total number of flats/units in complex (if applicable) | <input type="text"/> |
| For residential building, number of bedrooms | <input type="text"/> |
| Number of other rooms (excluding laundry, bathroom, toilet) | <input type="text"/> |

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

32 Are you (and/or your partner) using any rooms or buildings in your home property solely for business purposes?

This includes rooms used for a bed and breakfast or a room/office used solely for running a business.

No Go to next question

Yes Value of the rooms or buildings of your home property used only for business

\$

33 Is any portion of the land surrounding your home property used primarily for business purposes?

This includes using the land for cultivation, orchards, grazing animals or for other reasons such as camping sites.

No Go to next question

Yes Estimated value of the portion of the land (up to 2 hectares or 5 acres) surrounding your home property that you own and that is used primarily for business purposes

\$

34 Is your home part of a farm property?

No Go to 36

Yes Farm property primarily used for (for example, grazing, wheat, hobby)

35 Is the farm property currently operational/viable?

No

Yes

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

No

Yes

List any other constructions located on the property (for example, workers' quarters, manager's house)

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

36 Did you (and/or your partner) receive rental income from your home property at the entry/application date?

No Go to next question

Yes Provide documents showing details of the rental income and the costs for each property.

37 At the entry/application date, did any of the following people live in your home?

Tick all that apply. If there is more than 1 person provide a separate sheet for question 34 to question 37.

Carer: Any person providing daily care to you, who has occupied the home for at least 2 years Go to 38

Close relative: your sibling, child, grandchild, or parent who has occupied the home for at least 5 years Go to 38

None of the above Go to 41

38 Does this person still live in the home?

No Date vacated (DD MM YYYY)

Input fields for date: DD, MM, YYYY

Go to next question

Yes Go to next question

39 Is the carer/close relative in receipt of an income support payment?

No Complete and return the Aged Care Carer or close relative assessment (SA483) form. If you do not have this form, go to servicesaustralia.gov.au/forms Go to next question

Yes Go to next question

Consent by carer or close relative

40 Read this before answering the following question.

Services Australia or the Department of Veterans' Affairs needs to verify the period that your carer or close relative occupied your home and that they were eligible to receive an income support payment at the entry/application date.

Carer or close relative (protected person)

Before signing, make sure you have read **Privacy and your personal information** on page 21 of this assessment and also the **Protected person for aged care purposes** section on page 4 of the **Notes**.

Consent by carer or close relative

Details of carer or close relative

Family name

First given name

Second given name

Date of birth (DD MM YYYY)

| | | |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|

Centrelink Customer Reference Number (if known)

| | | | |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|----------------------|

OR _____

Department of Veterans' Affairs reference number

Relationship to the applicant

Phone number (including area code)

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

Signature of carer or close relative

| |
|---|
|  |
|---|

Date (DD MM YYYY)

| | | |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|

Your other property details

41 Other than your family home, did you (and/or your partner) own other properties in and/or outside of Australia at the entry/application date?

No **Go to 51**

Yes Give details below

Address of the property

| |
|----------|
| |
| |
| Postcode |

Country (if not in Australia)

| |
|--|
| |
|--|

If you own/owned more than one other property, at the entry/application date, you will need to copy and attach pages 10 to 11 answering questions **41** to **50** for each property.

42 What is the legal description of the other property (for example, lot, section, parish)?

This information can be found on a rates notice. If the property is made up of more than one title, provide details for each separate title.

| |
|--|
| |
| |
| |

Provide a copy of the council rates notice.

43 Who owns/owned your other property as shown on the property title at the entry/application date?

You Percentage owned %

Your partner Percentage owned %

Other Give details below

Name of person/entity

| |
|--|
| |
|--|

Percentage owned

| | |
|--|---|
| | % |
|--|---|

Provide a copy of each title deed if you answered 'Other'.

44 What type of property is this?

- Vacant land
- House on land larger than 2 hectares (5 acres)
- Townhouse
- Self contained flat (part of or attached to a house)
- Units/flats
- Retail premises
- Commercial premises
- Industrial premises
- Farm/primary producer property
- Market garden
- Hobby farm
- Bush block
- House
- Other, **Give details below**
for example, granny flat

| |
|--|
| |
| |
| |

45 What is your estimate of the current market value of the property, including land, buildings and water assets (for example, water rights, allocations or licences)?

If your other property is counted as an asset, you do not need to have it professionally valued. If required, we will verify the estimated value of the property at no cost to you.

\$

Provide a copy of the water rights, allocation or licence documents, if applicable.

Are there any circumstances affecting the value of the property?

This may include details such as:

- no water on property for grazing livestock
- lack of adequate fencing
- hills
- rocky ground
- natural bushland
- unusual title.

No **Go to next question**

Yes Give details below

| |
|--|
| |
| |
| |

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

46 What type of buildings are on the other property?

This information will assist us to value the property.

1 What is the approximate floor area in square metres? How old is the building?

Type of construction

Exterior (for example, brick, timber)

Interior (for example, plaster, not lined)

Roof (for example, iron, tiled)

General condition (for example, fair, good, poor)

Total number of flats/units in complex (if applicable)

For residential building, number of bedrooms

Number of other rooms (excluding laundry, bathroom, toilet)

If you (and/or your partner) have more than 1 building on this property, provide a separate sheet with details.

47 What is the area or dimension of the other property?

Complete **one** of these measurements only.

Area in hectares

or Area in acres

or Area in square metres

or Dimensions

X

If your property is made up of more than one title, provide a separate sheet with details of the area or dimensions for each title.

48 Was the property mortgaged or encumbered at the entry/application date?

No Go to next question

Yes



Provide the:

- mortgage or loan agreement(s) showing which assets or properties are held as security against the loan (if applicable)
- statement of each loan account.

49 Did you (and/or your partner) receive **rental income** from your other property, at the entry/application date?

Include rental income from properties both in and/or outside Australia.

No Go to next question

Yes



Provide documents showing details of the rental income and the costs for each property.

50 What is your estimate of the **current market value of the household contents** you (and/or your partner) own in the other property, at the entry/application date?

Only answer this question if this property is **not** your home property.

The **current market value** of the household contents is what you would get if you sold it. It is not the replacement or insured value.

If you do not provide an estimate, we will use a default amount of \$10,000.

Include:

- all furniture (including soft furnishings such as curtains), antiques and works of art
- electrical appliances such as televisions and fridges.

Do not include:

- fixtures such as stoves and built-in items.

Current market value

\$

Assets and income

- 51 What is your estimate of the **current market value** of your (and/or your partner's) **household contents** and **personal effects** at the entry/application date?

The **current market value** is the price that you would expect to get **if you sold the item**. It is not the replacement or insured value.

If you do not provide an estimate we will use a default amount of \$10,000.

Include:

- all furniture (including soft furnishings such as curtains), antiques and works of art
- electrical appliances such as televisions and fridges
- jewellery for personal use.

Do not include:

- fixtures such as stoves and built-in items.


An estimate of the current market value

\$

- 52 Did you (and/or your partner) own, partly own or have a financial interest in any **motor vehicles, boats, caravans or trailers** at the entry/application date?

No Go to next question

Yes Give details below

 Provide a copy of a statement showing the amount owing for each loan, if applicable.

| | |
|--|--|
| 1 Type of asset (for example, car) | Make (for example, Ford) |
| <input type="text"/> | <input type="text"/> |
| Model (for example, Focus) | Year |
| <input type="text"/> | <input type="text"/> |
| Current market value | Balance of loan(s) |
| \$ <input type="text"/> | \$ <input type="text"/> |
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |

| | |
|--|--|
| 2 Type of asset (for example, car) | Make (for example, Holden) |
| <input type="text"/> | <input type="text"/> |
| Model (for example, Astra) | Year |
| <input type="text"/> | <input type="text"/> |
| Current market value | Balance of loan(s) |
| \$ <input type="text"/> | \$ <input type="text"/> |
| Your share <input type="text"/> % | Partner's share <input type="text"/> % |

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

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


Include:

- savings accounts
- cheque accounts
- term deposits
- joint accounts
- accounts you hold in trust or under any other name
- money held in church or charitable development funds
- money located in travel money cards or travellers cheques.

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 (AUD).

Do not include:

- superannuation
- shares
- managed investments, or
- an account used exclusively for funding from the National Disability Insurance Scheme (NDIS).

 Provide evidence from your financial institution that shows your current account balance, account number and account holder name(s) for each account held. Copies can be provided. ATM slips are not acceptable.

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 %

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

54 Read this before answering the following question.

Superannuation includes:

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

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 (for example, ComSuper pension, State Super pension and Australian Defence Force superannuation payments)
- Superannuation Pension (non-defined benefit).

Did you (and/or your partner) have any **money invested in superannuation or income stream products** at the entry/application date?

No Go to next question

Yes Give details below and in the next column



For each account-based income stream, you (and/or your partner) will need to provide:

- a Services Australia/DVA schedule or similar schedule, or
- a **Details of income stream product (SA330)** form.

If you do not have this form, go to **servicesaustralia.gov.au/forms**

The schedule or form must be completed by your:

- product provider
- the trustee of the Self Managed Superannuation Funds (SMSF) or Small APRA Funds (SAF), or
- SMSF administrator.

Provide a copy of the latest statements for superannuation funds and retirement savings accounts. Statements must include a breakdown of your superannuation investment portfolio.

If you have a SMSF or SAF, provide the financial statement including income tax return and member statement.

Do not include printouts of online balances.

Continued

| | | | | |
|---|--|----------------------|----------------------|----------------------|
| 1 Name of institution/fund manager | | | | |
| <input type="text"/> | | | | |
| Name of fund | | | | |
| <input type="text"/> | | | | |
| Account balance (if applicable) | Amount that can be withdrawn as a lump sum (if applicable) | | | |
| \$ <input type="text"/> | \$ <input type="text"/> | | | |
| Amount of income received (if any) | How often (for example, monthly) | | | |
| \$ <input type="text"/> | per <input type="text"/> | | | |
| Date of purchase (DD MM YYYY) | Your share | Partner's share | | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

| | | | | |
|---|--|----------------------|----------------------|----------------------|
| 2 Name of institution/fund manager | | | | |
| <input type="text"/> | | | | |
| Name of fund | | | | |
| <input type="text"/> | | | | |
| Account balance (if applicable) | Amount that can be withdrawn as a lump sum (if applicable) | | | |
| \$ <input type="text"/> | \$ <input type="text"/> | | | |
| Amount of income received (if any) | How often (for example, monthly) | | | |
| \$ <input type="text"/> | per <input type="text"/> | | | |
| Date of purchase (DD MM YYYY) | Your share | Partner's share | | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

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

55 Did you (and/or your partner) have any **managed investments** in and/or outside Australia at the entry/application date?

Include:

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


Do not include:

- conventional life insurance policies (policies that can be cashed in)
- funeral bonds
- superannuation or rollover investments
- investments purchased with a margin loan.

Asia Pacific Investment Register (APIR) code – is commonly used by fund managers to identify individual financial products.

No Go to next question

Yes Give details below

 Provide a copy of the document which gives details for each investment (for example, certificate with number of units or account balance).

1 Name of company

Name of product (for example, investment trust) Type of product/option (for example, 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 (for example, investment trust) Type of product/option (for example, balanced, growth)

Number of units APIR code (if known)

Current market value Currency if not AUD

\$

Your share % Partner's share %

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

56 At the entry/application date did you (and/or your partner) own any **shares**, or other **securities listed** on a stock/securities exchange in and/or outside Australia, or in public companies **not listed** on a stock exchange?

Include:


- futures
- options
- derivatives
- rights
- shares
- preference shares
- convertible notes.

Do not include:

- managed investments
- self managed superannuation funds.

No Go to next question

Yes Give details below

 Provide the statement for each share holding.

1 Name of the public company

Australian Securities Exchange (ASX) code (if you have one)

Number of shares held

Country if not Australia Your share Partner's share

 % %

2 Name of the public company

ASX code (if you have one)

Number of shares held

Country if not Australia Your share Partner's share

 % %

3 Name of the public company

ASX code (if you have one)

Number of shares held

Country if not Australia Your share Partner's share

 % %

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

57 Did you (and/or your partner) have any **bonds or debentures** at the entry/application date?

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, aged care refundable accommodation deposits, or aged care refundable accommodation contributions.

No Go to next question

Yes Give details below

 Provide 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 %

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

58 Did you (and/or your partner) have any **funeral bonds, funeral investments** or have a contract to have funeral services provided for which an agreed sum has already been paid to the provider at the entry/application date?

No Go to next question

Yes Give details below

 Provide documentation showing details of the funeral bonds, funeral investments or a copy of each contract.

1 Name of company

Name of product

APIR code (if known)

Purchase price including 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 including instalments but not interest

\$

Current value as per latest statement

\$

Your share

%

Partner's share


%

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

59 Did you (and/or your partner) have any **life insurance** policies that could be cashed in at the entry/application date?

No Go to next question

Yes Give details below

 Provide a copy of the statement for each policy.

1 Name of product

Policy number

| Number of units | Your share | Partner's share |
|----------------------|------------------------|------------------------|
| <input type="text"/> | <input type="text"/> % | <input type="text"/> % |

2 Name of product

Policy number

| Number of units | Your share | Partner's share |
|----------------------|------------------------|------------------------|
| <input type="text"/> | <input type="text"/> % | <input type="text"/> % |

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

60 Have you (and/or your partner) paid a **lump sum accommodation payment to a residential aged care home** at the entry/application date?

No Go to next question


Yes Give details below

How much was paid

\$

When was the last payment made (DD MM YYYY)

| | | | | | |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|

 Provide a copy of a receipt for all lump sum accommodation payments and documents detailing the source of the funds. If the lump sum accommodation payment was paid in instalments, provide a receipt for each payment made.

61 Did you (and/or your partner) have **money on loan** to another person or organisation at the entry/application date?

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

Do not include loans to secure accommodation in retirement villages or aged care.

No Go to next question

Yes Give details below

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

If the money was loaned to a private trust you will need to complete and return the **Private Trust (Mod PT)** form. If you do not have this form, go to servicessaustralia.gov.au/forms

1 Who did you lend the money to?

Date lent (DD MM YYYY)

| | | | | | |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|

Amount lent

\$

Current balance of loan

\$

Lent by you %

Lent by your partner %

2 Who did you lend the money to?

Date lent (DD MM YYYY)

| | | | | | |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|

Amount lent

\$

Current balance of loan

\$

Lent by you %

Lent by your partner %

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

62 In the 5 years **before** your application/entry date, have you (and/or your partner) **given away**, or sold for less than their market value, or surrendered a right to any cash, assets, property or income?

Gifting is where you:

- give away assets, or
- transfer them for less than their market value.

For example, if you or your partner:

- give away/transfer shares in a private company
- transfer your shares or units in a trust or company and do not get full market value for them
- give up control of a trust or company – this is a gift of all the assets the trust or company holds
- own a property and sell it for less than it is worth
- buy a car as a present
- have 10% of your wages donated to your church
- forgive a loan
- have to repay a business loan because you guaranteed it
- put money into a family trust and neither you nor your partner control the trust.

It is not gifting if you:

- own a house valued at an amount, but sold it on the open market with the best offer to date, as you could not wait for a higher offer
- have a debt that you cannot repay, so you transfer a car worth about the same to wipe out the debt
- put money into a family trust that you or your partner control.

For more information, refer to page 4 of the **Notes**.

No Go to next question

Yes Give details below

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

| | |
|-------------------------|-------------------------|
| What it was worth | What you got for it |
| \$ <input type="text"/> | \$ <input type="text"/> |

| | | |
|--|------------------------|------------------------|
| Date given or sold (DD MM YYYY) | Your share | Partner's share |
| <input type="text"/> <input type="text"/> <input type="text"/> | <input type="text"/> % | <input type="text"/> % |

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

Continued

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

| | |
|-------------------------|-------------------------|
| What it was worth | What you got for it |
| \$ <input type="text"/> | \$ <input type="text"/> |

| | | |
|--|------------------------|------------------------|
| Date given or sold (DD MM YYYY) | Your share | Partner's share |
| <input type="text"/> <input type="text"/> <input type="text"/> | <input type="text"/> % | <input type="text"/> % |

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


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

63 Did you (and/or your partner) **receive payments from outside Australia** at the entry/application date?

Include pensions from other countries, benefits, allowances, superannuation, compensation and war related payments in the type of currency in which it is paid. We will convert this into Australian dollars. 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

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

1 Type of payment

Country which pays it?

| | |
|---|----------------------|
| Amount paid (before tax or deductions) | Currency if not AUD |
| <input type="text"/> | <input type="text"/> |

Paid to: You Your partner

Continued

2 Type of payment

Country which pays it?

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

Paid to: You Your partner

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


64 Did you (and/or your partner) have an interest in a **business** at the entry/application date?

Include:

- self-employed
- sole trader
- partnership
- sub-contractor.

No ► *Go to next question*

Yes ►

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

65 Have you (and/or your partner) **had an interest** in a **private trust** in any of the ways detailed below, in the 5 years up to the entry/application date?

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
- 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
- can expect the trustee or appointor of a trust to act in accordance with your wishes.

No ► **Go to 67**

Yes ►

 If you (and/or your partner) have not previously advised us of this trust, complete and return a **Private Trust (Mod PT)** form.

If you do not have this form, go to servicesaustralia.gov.au/forms

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

No

Yes

67 Have you (and/or your partner) **had an interest** in a **private company** in any of the ways detailed below, in the 5 years up to the entry/application date?

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
- can expect the governing director or majority shareholder to act in accordance with your wishes.

No ► *Go to next question*

Yes ► Was your involvement only as a director and you (and/or your partner) have no shares in or loans to the company?

No ►

 You will need to complete and return the **Private Company (Mod PC)** form.

If you do not have this form, go to servicesaustralia.gov.au/forms
► *Go to next question*

Yes ► *Go to next question*

68 Did you (and/or your partner) have any **other assets** (in or outside Australia) that you have not already told us about on this form at the entry/application date?

Include:

- taxi plates
- time share
- racehorses
- travellers cheques
- crypto currency (for example, bitcoin)
- collectables (for example, stamps, coins, wine, art, antiques)
- commercial licences (for example, fishing, hunting)
- water assets including rights, allocations or licences not associated with land owned by you (and/or your partner).

Do not include an account used exclusively for funding from the National Disability Insurance Scheme (NDIS).

No Go to next question

Yes Give details below

 Provide supporting documentation.

1 Description of asset

| | |
|----------------------|----------------------|
| Current market value | Amount owed |
| <input type="text"/> | <input type="text"/> |

| | | |
|----------------------|------------------------|------------------------|
| Currency if not AUD | Your share | Partner's share |
| <input type="text"/> | <input type="text"/> % | <input type="text"/> % |

2 Description of asset

| | |
|----------------------|----------------------|
| Current market value | Amount owed |
| <input type="text"/> | <input type="text"/> |

| | | |
|----------------------|------------------------|------------------------|
| Currency if not AUD | Your share | Partner's share |
| <input type="text"/> | <input type="text"/> % | <input type="text"/> % |

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

69 Did you (and/or your partner) receive any **other income** that you have not already listed on this form at the entry/application date?


Include income or money from:

- income from boarders and lodgers
- income protection insurance
- life interests
- other Australian government departments
- other income (for example, royalties)
- other payments from outside Australia
- regular compensation payments or damages
- work (including holiday pay, long service leave, sick pay)
- gratuities (tips).

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

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

1 Type of income

Gross amount received

\$ per

| | | |
|----------------------|------------------------|------------------------|
| Currency if not AUD | Your share | Partner's share |
| <input type="text"/> | <input type="text"/> % | <input type="text"/> % |

2 Type of income

Gross amount received

\$ per

| | | |
|----------------------|------------------------|------------------------|
| Currency if not AUD | Your share | Partner's share |
| <input type="text"/> | <input type="text"/> % | <input type="text"/> % |

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

Questions continue next page ►

Department of Veterans' Affairs customers

70 Are you (and/or your partner) a veteran or a dependant of a deceased veteran?

No Do not continue with these questions as you (and/or your partner) are not a veteran or a dependant of a veteran. ► **Go to 71**

Yes Go to next question

Did you (and/or your partner) receive a payment of \$25,000 from the Australian Government as compensation for internment by:

- North Korean forces during the Korean war, or
- Japanese or Axis forces during World War II?

No Go to next question

Yes The amount of these payments is deducted from the value of your assets if you have received them. ► Go to next question

Read this before answering the following question.

Qualifying service is service in a war or war like operations where you incurred danger from hostile forces of the enemy.

Do you and/or your partner have **qualifying service**?

No

Yes Any Department of Veterans' Affairs Adjusted Disability Pension you receive will be exempt from the aged care income assessment.



Person authorised to act on behalf of a Department of Veterans' Affairs client

The Department of Veterans' Affairs clients can nominate a representative for income support payment purposes.

Persons authorised to act on behalf of a client, such as those holding a power of attorney, are able to assist you to meet your obligations under the *Veterans' Entitlement Act 1986* by notifying the Department of Veterans' Affairs of changes on their behalf. However, the obligation to inform the Department of Veterans' Affairs of changes in circumstances that may affect your pension or allowance(s) remains with you.

For income support purposes, the Department of Veterans' Affairs authorised persons have the authority to:

- enquire about your pension
- assist you to meet your obligations to the Department of Veterans' Affairs.

Persons holding a valid financial power of attorney can also be accepted as having the authority to:

- act as a signatory for you
- receive income support related mail on your behalf.

If you wish to be registered as a power of attorney for future contacts with the Department of Veterans' Affairs, provide a certified copy of your power of attorney documentation.

For information about the Department of Veterans' Affairs authorised person arrangements, call the Department of Veterans' Affairs on 1800 VETERAN (1800 838 372).

Go to next page ►

Checklist

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

You must provide **copies** of documents. The copies will not be returned.

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

Tick all that apply

| | |
|--|--------------------------|
| Evidence of a redress payment to be exempt from residential aged care means test (Required at question 17) | <input type="checkbox"/> |
| Details of the sale of your home or details of the transfer or retirement village agreement (Required at question 24) | <input type="checkbox"/> |
| Documents to verify the details of the sale of your former home (If you answered Yes at question 25) | <input type="checkbox"/> |
| Details on value of mobile home/caravan/boat, refundable entry contributions or property (If you answered Yes at question 26 or 28) | <input type="checkbox"/> |
| Statement showing the amount owing for each mortgage (If you answered Yes at question 26, 28 or 48) | <input type="checkbox"/> |
| Council rates notice (Required at question 29 or 42) | <input type="checkbox"/> |
| Documents showing details of the rental income (If you answered Yes at question 36 or 49) | <input type="checkbox"/> |
| Aged Care Carer or close relative assessment (SA483) form (If you answered No at question 39) | <input type="checkbox"/> |
| Details of each additional property (If you answered Yes at question 41) | <input type="checkbox"/> |
| Title deed(s) for each property (If you answered Other at question 43) | <input type="checkbox"/> |
| Documents of water rights, allocation or licence (Required at question 45) | <input type="checkbox"/> |
| Details on amount owing for each loan secured by vehicles (If you answered Yes at question 52) | <input type="checkbox"/> |
| Documents showing balances and details of bank, building society and credit union accounts (Required at question 53) | <input type="checkbox"/> |

Continued

| | |
|--|--------------------------|
| A Services Australia/DVA schedule or similar schedule or a Details of income stream product (SA330) (If you answered Yes at question 54) | <input type="checkbox"/> |
| Statements or schedules for each fund, including latest council rates notices for any real estate held by SMSF and SAF (If you answered Yes at question 54) | <input type="checkbox"/> |
| Managed investment certificates or similar document (If you answered Yes at question 55) | <input type="checkbox"/> |
| Share certificates or statement for each shareholding listed on a stock exchange (If you answered Yes at question 56) | <input type="checkbox"/> |
| Investment bond/debenture documents (If you answered Yes at question 57) | <input type="checkbox"/> |
| Details of the funeral bond(s) or funeral investment(s) (If you answered Yes at question 58) | <input type="checkbox"/> |
| Statement for each life insurance policy (If you answered Yes at question 59) | <input type="checkbox"/> |
| Receipts for all lump sum accommodation payments (If you answered Yes at question 60) | <input type="checkbox"/> |
| Money on loan documents (if available) and Private Trust (Mod PT) form (if required) (If you answered Yes at question 61) | <input type="checkbox"/> |
| Documents with details of payments by authorities or agencies outside Australia (If you answered Yes at question 63) | <input type="checkbox"/> |
| Personal income tax return(s), business income tax return, a profit and loss statement, depreciation schedule and any other explanatory notes of the business or company (If you answered Yes at question 64) | <input type="checkbox"/> |
| Private Trust (Mod PT) form (if required) (If you answered Yes at question 65) | <input type="checkbox"/> |
| Private Company (Mod PC) form (If required at question 67) | <input type="checkbox"/> |
| Documents with details on 'other' assets (If you answered Yes at question 68) | <input type="checkbox"/> |
| Documents with details on 'other' income (If you answered Yes at question 69) | <input type="checkbox"/> |
| Documents related to a signing on behalf of the person the assessment is for (If signing at question 73) | <input type="checkbox"/> |

Returning this form

Return this form and any supporting documents to:

- **Services Australia**

if you receive an income support payment from Services Australia, return to:

Services Australia
Residential Care
PO Box 7821
Canberra BC ACT 2610

- **Department of Veterans' Affairs**

if you receive an income support payment from the Department of Veterans' Affairs, return to:

Department of Veterans' Affairs
GPO Box 9998
Brisbane QLD 4001

You should do this **before** you enter care (if possible) to make sure your cost of care can be calculated as quickly as possible. If you enter aged care without having an assessment, you could be asked to pay the maximum aged care fees applicable.

This page has been left blank intentionally.

If you are authorising a person or organisation to enquire or act on your behalf, complete and return the form on the following pages separately.



If you are receiving a Department of Veterans' Affairs (DVA) means tested payment (see **Notes** page 3) you should complete and return the **Aged Care Request for a nominee for Department of Veterans' Affairs customers (AC019)** form. If you do not have this form, go to servicesaustralia.gov.au/forms

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Authorising a person or organisation to enquire or act on your behalf

centrelink



When to use this form

You can use this form to authorise a person or organisation to enquire or act on your behalf for Centrelink payments and services including aged care.



If you or your nominee have your Centrelink payments income managed, call **1800 132 594** before filling in this form.



Protecting you and your information

If you are affected by family and domestic violence, there is help available. Call **132 850** Monday to Friday, 8am to 5pm local time, and ask to speak to a social worker. Otherwise, you can contact 1800RESPECT (**1800 737 732**), a 24 hour service. If you are in immediate danger, call **000**. For more information, go to servicesaustralia.gov.au/domesticviolence

If you think the arrangement you have given a person or organisation is being misused, you can call us on your regular payment line, or call **132 850** Monday to Friday from 8 am to 5 pm, or visit one of our service centres.



For more information

For Child Support, Medicare or more information, go to servicesaustralia.gov.au/authorisedrepresentative

If you need to call us, use your regular payment line.

To speak to us in your language, call **131 202**. Call charges may apply.

We can translate documents you need to give us for free.

If you have a hearing or speech impairment, you can call the **TTY service** on **1800 810 586**. A TTY phone is required to use this service.

Type of arrangement you can request

The **information below** may help you choose the type of arrangement that best suits your needs and will assist you to answer question 5. There are 4 types of arrangements that can be requested.

If you want to have a different correspondence nominee to your payment nominee, person permitted to enquire or person permitted to update, you will need to complete a separate form.

| Your authorised person or organisations can: | Person permitted | | Correspondence nominee | Payment nominee |
|--|------------------|-----------|------------------------|-----------------|
| | to enquire | to update | | |
| Ask us questions about your payments or services | ✓ | ✓ | ✓ | ✓ |
| Tell us about changes to your circumstances | ✗ | ✓ | ✓ | ✗ |
| Respond to requests for information | ✗ | ✓ | ✓ | ✗ |
| Come to appointments with you or, if appropriate, on your behalf | ✗ | ✗ | ✓ | ✗ |
| Complete and sign forms and statements | ✗ | ✗ | ✓ | ✗ |
| Get copies of your letters | ✗ | ✗ | ✓ | ✗ |
| Get your Centrelink payments, and use them only for your benefit | ✗ | ✗ | ✗ | ✓ |
| View and update your information online | ✗ | ✗ | ✓ | ✓ |
| Claim payments and services for you | ✗ | ✗ | ✓ | ✗ |

Identity requirements

Power of Attorney or authorised person

The **Power of Attorney** or **authorised person** of the customer will need to provide photo identification in person at one of our service centres, agents or access points to have their identity verified. For example, a current Australian driver licence or valid passport can be provided – for a full list, go to servicesaustralia.gov.au/identity

Authorised organisation staff

Staff from your authorised organisation will need to verify their identity details when they create their Provider Digital Access (PRODA) account to access nominee online services. For more information, go to servicesaustralia.gov.au/proda

Important information – type of arrangement

When choosing your type of arrangement, you should consider the following:

- you can only have **one** correspondence and **one** payment nominee. These can be different people. You will need to complete a separate form for each
- a person or organisation who is **both a correspondence and payment nominee** can enquire, act and get your Centrelink payments and aged care fee assessment on your behalf
- the person you are authorising cannot have a nominee acting on their behalf
- you can still deal with us, even if you have authorised a person or organisation to assist you
- if you get more money from us than you are entitled to, you will need to repay this. Your nominee is not responsible for repaying this money
- if you have a nominee of the same type already in place, this request will automatically cancel the existing arrangement. Your existing nominee will get a letter telling them of the cancellation.

Person permitted to enquire or update – responsibilities and obligations



A person permitted to enquire or update:

- is required to use the information we give them to assist you to better understand your payment and services.



A person permitted to update:

- can provide us with information to update your payment and services
- must act in your best interest.

A person permitted to enquire or update cannot:

- make decisions for you
- sign forms or statements
- get copies of your letters.

You can authorise more than one person or organisation to be your person permitted to enquire or update.

Correspondence and payment nominee – responsibilities and obligations



A correspondence nominee is required to:

- let us know of any changes to your circumstances **within 14 days (within 28 days if they are outside Australia)**
- respond to notices, including providing requested information and reporting notifiable events. If they do not respond to a notice, it will mean that you (as the customer), did not meet your obligations. If applicable, your payments may be stopped
- act in your best interest
- let us know of any changes that may affect their ability to be your nominee.



A payment nominee is required to:

- use your Centrelink payments for your benefit
- keep records on how the money was spent. We can review these records at any time. If the payment nominee does not provide this information, financial penalties may be imposed on them
- act in your best interest
- let us know of any changes that may affect their ability to be your nominee.

Aged care calculation of your cost of care

Your **person permitted to enquire** can ask questions only, and your **person permitted to update** can ask questions and make updates to your income and assets.

If you are accessing aged care services, your **correspondence nominee** will be able to:

- complete and sign forms for calculation of your aged care cost of care
- ask questions about your aged care cost of care
- update your income and assets
- get copies of your aged care cost of care letters.

Part C – Customer declaration and Third Party authorisation

8

Tick one only

I declare that I am able to **GO** to **Customer Declaration** below


OR If the customer is not able to **GO** to **Third Party authorisation** below

Read this before continuing. Make sure you have read **Privacy and your personal information** on page 1 of this form.

Customer declaration

If the customer is able to make their own decisions but is not able to sign this form, it may be signed by their Power of Attorney.

Tick this box if a Power of Attorney is signing the customer declaration

-  The Power of Attorney needs to provide:
- a copy of the legal documents
 - photo identification for the attorney, such as an Australian driver licence or valid passport
 - if there are multiple attorneys with majority or joint decision making, you will need to copy this page and provide the name and signature of each attorney.

Name of the Power of Attorney

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

I authorise the person or organisation named on this form, to deal with Services Australia on my behalf according to the type of arrangement shown on this form.

I understand that:

- this is voluntary and I can cancel this arrangement at any time.
- the type of arrangement may be rejected or cancelled at any time by Services Australia, if the person or organisation is not able to meet their responsibilities and obligations.
- giving false or misleading information is a serious offence.

Your signature

Date
(DD MM YYYY)




You have now completed **Part C**.
The **authorised person or organisation** is to complete **Part D**.

GO to question 9

Third Party authorisation

If the customer is not able to sign this form due to physical or mental disability and the type of arrangement is in the person's best interest, a third party may sign this section on their behalf.

 An appropriate third party may be one of the following and they must provide evidence as outlined below:

- a relevant professional, for example, a treating doctor, nurse, case worker or social worker
 - provide a letter or the medical evidence of the customer's incapacity
- the holder of an Enduring Power of Attorney (financial and/or legal decisions)
 - provide a copy of the legal document and medical evidence
 - provide photo identification for the attorney, such as an Australian driver licence or valid passport
 - if there are multiple attorneys with majority or joint decision making, they must all provide a letter or signature with their agreement
- the person or organisation holding a guardianship, financial management or administration order
 - provide a copy of the order or certificate.

Will receiving Centrelink or aged care letters cause distress or confusion for the customer? No Yes

Name of the third party

Relationship to customer

Address

Postcode

Contact phone number
(including area code)

I declare that:

- the customer is not able to sign this form due to physical or mental disability.
- it is in the customer's best interest to authorise the person or organisation named on this form, to deal with Services Australia on the customer's behalf according to the type of arrangement shown on this form.
- the information I have provided in this form is complete and correct.

Signature of the third party

Date
(DD MM YYYY)



You have now completed **Part C**.
The **authorised person or organisation** is to complete **Part D**.

GO to question 9

Checklist

Identity requirements – Authorised person – (question 7) or Power of Attorney (question 8)

- authorised person, or
- Power of Attorney, either completing the customer declaration or Third Party authorisation section, is required to provide photo identification in person at one of our service centres, agents or access points. For locations go to servicesaustralia.gov.au/findus.



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

Provide a copy of the relevant documents. They do not need to be certified and will not be returned to you.

| | | Tick all that apply |
|---|--|--------------------------|
| Customer declaration – I am able to make my own decisions (question 8) | | |
| If the Power of Attorney completes the customer declaration, they will need to provide | | |
| • the Power of Attorney (financial and/or legal decisions) document – if there are multiple attorneys with majority or joint decision making, you will need to copy page 3 of the form and provide the name and signature of each attorney | | <input type="checkbox"/> |
| • photo identification for the attorney, has been provided in person to a service centre, agent or access point | | <input type="checkbox"/> |
| Third Party authorisation – the customer is not able to make their own decisions (question 8) | | |
| If a third party provides authorisation, they must provide evidence as outlined below | | |
| • a relevant professional, for example, a treating doctor, nurse, case worker or social worker – a letter or the medical evidence of the customer's incapacity | | <input type="checkbox"/> |
| • the holder of an Enduring Power of Attorney (financial and/or legal decisions) – a copy of the legal document and medical evidence of the customer's incapacity | | <input type="checkbox"/> |
| – photo identification for the attorney, has been provided in person to a service centre, agent or access point | | <input type="checkbox"/> |
| – if there are multiple attorneys with majority or joint decision making, they must all provide a letter or signature with their agreement | | <input type="checkbox"/> |
| • the person or organisation holding a guardianship, financial management or administration order – a copy of the order or certificate | | <input type="checkbox"/> |
| If your authorised person or organisation holds any of the following, they will need to provide a copy of the documents (question 9) | | |
| • Power of Attorney (financial and/or legal decisions) | | <input type="checkbox"/> |
| • Enduring Power of Attorney (financial and/or legal decisions) | | <input type="checkbox"/> |
| • Guardianship order | | <input type="checkbox"/> |
| • Financial management/administration order | | <input type="checkbox"/> |

Stopping your arrangement

You can cancel your arrangement at any time, unless it is a court, tribunal, guardianship or an administration appointed arrangement.

If you cancel your nominee arrangement, a letter will automatically be sent to you and your nominee.

To cancel the type of arrangement:

- call us – go to servicesaustralia.gov.au/phoneus
- use your **online account** to cancel or change your correspondence and/or payment nominee at any time
- write to us – go to servicesaustralia.gov.au/contactus

Centrelink may review, reject or cancel your type of arrangement at any time. This includes if the person or organisation is not able to meet their responsibilities and obligations.

Returning this form

Return this form and any supporting documents:

- **online** (excluding identity documents) using your Centrelink online account. For more information, go to [servicesaustralia.gov.au/centrelinkuploadocs](https://servicesaustralia.gov.au/centrelinkuploaddocs)
- post to: Services Australia, PO Box 7800, CANBERRA BC ACT 2610
- fax to: 1300 786 102
- in person at one of our service centres.