

# Information you need to know about your request for

## Aged care fees income assessment

Most aged care services in Australia, including home care services, are subsidised through government payments to providers. You may be asked to contribute to the cost of your care if you can afford to do so.

The aged care fees income assessment asks for details about your income so we can advise you of your income tested aged care fees if:

- your Home Care Package has started on or after 1 July 2014, or
- your permanent residential aged care admission commenced before 1 July 2014.

**If you receive a means tested Australian income support payment from Centrelink, such as the:**

- **Age Pension, or**
- **Disability Support Pension, or**

**you receive from the Department of Veterans' Affairs, such as the:**

- **Service Pension, or**
- **Income Support Supplement**

**you do not need to complete this form. The Department of Human Services or the Department of Veterans' Affairs will have sufficient information to work out your income tested care fees.**

However, you can use this form to receive advice on your fees before commencing a Home Care Package. You can either complete your relevant details and sign this form or, if you receive a means tested income support payment from the Department of Human Services, you can contact the Department of Human Services on Freecall™ **1800 227 475** to trigger the pre-commencement assessment.

If you do not receive any means tested Australian income support payments, you will need to complete the entire form to obtain an income assessment.

You can choose **not** to provide your income details and opt out of an assessment using the ***Aged Care Fees Income Assessment*** form (SA456). If you do not seek an assessment, you may be asked to pay the **maximum applicable fees**.

**If you receive a non-income tested payment from Centrelink, such as the:**

- **Age Pension (Blind)**
- **Disability Support Pension (Blind)**
- **Carer Allowance, or**
- **Mobility Allowance**

**you will need to complete the form as we will not have enough information about your income to complete the assessment.**

*Continued*

**Keep these Notes (pages 1 to 8) for your information.**

If you receive a non-income tested payment from the Department of Veterans' Affairs, such as the:

- Disability Pension, or
- War Widow's Pension

and you do not receive the Income Support Supplement with these pensions, you will need to complete the form, as we will not have enough information about your income to complete the assessment.

If you complete this form before commencing a Home Care Package, the initial fee notification advice you receive will be valid for 120 days unless there is a significant change in your circumstances in which case you will be required to notify us.

**Important information for Australian Ex-Prisoners of War and Victoria Cross recipients.**

If you are an Australian Ex-Prisoner of War or Victoria Cross recipient you may not need to fill in this form. Please contact the Department of Veterans' Affairs on **133 254**, if you live in regional Australia call on Freecall™ **1800 555 254**.

**For more information**

Go to [humanservices.gov.au/agedcare](https://humanservices.gov.au/agedcare) or call us on Freecall™ **1800 227 475**.

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

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

If you receive a payment from the Department of Veterans' Affairs (DVA), call DVA on **133 254**, if you live in regional Australia call on Freecall™ **1800 555 254**.

**Note:** Call charges may apply.

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

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## Aged care fees income assessment

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### Permission to share information

Commonwealth legislation requires your permission for the Department of Human Services to send your details to the Department of Social Services and the Department of Veterans' Affairs. If you elect NOT to provide your permission to share this information for aged care purposes, you may be charged the maximum daily fees.

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### Assessing your income

If you have a **partner**, you will be asked questions about your combined income. Your income will then be assessed as half of this combined amount.

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### Definition of a partner

For the purpose of the income assessment, a partner can be either:

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

Both opposite-sex and same-sex relationships are recognised.

If you both want an assessment you will each need to fill in a separate assessment form.

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### If you choose not to provide details of your income

It is not compulsory to have a combined assets and income assessment, and you can opt out using the ***Aged Care Fees Income Assessment*** form (SA456).

If you do not seek an assessment, you may be required to pay a higher amount for your aged care and will not be eligible for any Australian Government assistance with your aged care costs.

This means that you can be asked by your service provider to pay the full cost of your care.

In assessing your income we consider money received from employment and money deemed to be earned from investments.

We also include income earned from outside Australia.

**Income may include:**

- gross income from employment
- compensation or damages payments
- income replacement insurance (personal accident and sickness insurance)
- profit from withdrawal of money from superannuation or rollover investments
- income from allocated pensions/annuities (including investments in and pensions from countries other than Australia)
- gratuities
- net income from business, including farms
- family trust distributions or dividends from private company shares
- income attributable to the controllers of a private trust or private company
- income from rental property
- income from a life interest
- income from boarders and lodgers
- superannuation and pensions from countries other than Australia
- payments from other government departments (e.g. ABSTUDY, Department of Veterans' Affairs pensions)
- income from income stream products, such as annuities and allocated products
- funeral bonds and funeral investments
- deemed income from financial assets.

Deeming is a simple set of rules used to assess income from financial assets. Under these rules we assume financial assets are earning a certain rate of income, regardless of the income they actually earn. The deeming rates are monitored to make sure they are achievable from safe investments and that they remain appropriate. Financial assets may include:

- bank, building society and credit union accounts
- term deposits and debentures
- friendly society bonds
- managed investments (e.g. property trusts)
- listed shares and securities
- shares in unlisted public companies
- gold and other bullion
- superannuation investments (such as approved deposit funds and deferred annuities) if you are over age pension age
- short-term asset tested income streams
- loans, including those to family trusts and companies.

In addition, if you have given away money or assets in the last 5 years, these assets may be treated as if you still own the asset and a 'deemed' income calculated.

## Contact person

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### Nominating a contact person

#### Nominating a person to deal with Centrelink or the Department of Veterans' Affairs on your behalf.

- You can authorise someone to deal with Centrelink or the Department of Veterans' Affairs on your behalf.
- This arrangement is voluntary. You or your contact person can cancel or change this arrangement at any time.
- Both you and your contact person must read and sign the relevant statements in the ***Aged Care Fees Income Assessment*** form (SA456).
- If you cannot complete this section you can get someone who is your legal guardian or who holds your power of attorney to complete and sign this section. If there is no legal guardian or someone with a power of attorney, the signature of an appropriate responsible person must be obtained, for example, a treating medical officer.

For more information about contact person arrangements, call the Department of Veterans' Affairs on **133 254** or Centrelink on **1800 227 475**.

## Changes you should tell us about

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You should tell us if:

- you marry; are in or commence an opposite-sex or same-sex registered or de facto relationship, reconcile with a former partner, start living with someone as their partner, **or**
- you separate from your partner, **or**
- your partner dies, **or**
- your (or your partner's) financial circumstances change, **or**
- a dependent child or student either enters or leaves your care.

This is because changes such as these may affect your income assessment and the aged care fees you pay. To advise us of changes, call the Department of Human Services on Freecall™ **1800 227 475** or the Department of Veterans' Affairs on **133 254**.

### If you are suffering from financial hardship

If you are having trouble meeting your care costs or experience financial hardship, you may be eligible for financial hardship assistance. For more information, go to **humanservices.gov.au/agedcare** or call us on Freecall™ **1800 227 475** or visit one of our service centres.

### **Commonwealth Seniors Health Card**

People of age pension age who do not receive a pension may be eligible to receive a Commonwealth Seniors Health Card (certain residence requirements and income limits apply). The Commonwealth Seniors Health Card allows holders (but not their dependants) to receive a number of Commonwealth concessions (such as Pharmaceutical Benefits Scheme medicines). A supplement payment is available to Commonwealth Seniors Health Card holders and is paid quarterly in January, March, June and September.

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### **Financial Information Service Officers**

Financial Information Service (FIS) Officers can give you free, independent information. This will help you understand investments and how they work, and help you make better financial decisions. If you wish to contact the Financial Information Services go to [humanservices.gov.au/fis](http://humanservices.gov.au/fis) or call us on **132 300** and say Financial Information Service when prompted.

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### **Health Care Card**

A Health Care Card provides you access to pharmaceutical medications listed under the Pharmaceutical Benefits Scheme at a reduced cost. You **may** also receive other concessions provided by state and territory governments.

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### **Indigenous Services Staff**

Indigenous Services staff are located at most of our service centres. Some service centres also have interpreters who speak Aboriginal or Torres Strait Islander languages and teams who visit and help remote communities.

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### **Social Workers**

We have social workers at our service centres and Smart Centres throughout Australia. Social workers can offer you personal counselling and support in difficult times, such as domestic and family violence, severe financial hardship, homelessness, loss and bereavement. They can refer you to other services and programs like housing, health, emergency relief, legal and/or counselling services and support groups.

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If you need any help or further information about these services and concessions, go to [humanservices.gov.au/agedcare](http://humanservices.gov.au/agedcare) or call us on Freecall™ **1800 227 475** or visit one of our service centres.

## Information in other languages

### English

To speak to us in a language other than English, call **131 202**. Call charges apply. Calls from mobile phones may be charged at a higher rate. Go to [humanservices.gov.au](https://humanservices.gov.au) and select the language button to find information in your language.

### Arabic

للتحدّث إلينا باللغة العربيّة، اتصل بالرقم **131 202**. تنطبق رسوم على المكالمات. وقد يتمّ خصّيل رسوم بمعدل أعلى على المكالمات الجّارة من الهواتف النّقالة. انهب إلى الموقع [humanservices.gov.au](https://humanservices.gov.au) واختر زر اللّغة للنعور على معلومات بلغتك.

### Chinese

您可以撥打電話**131 202**，使用中文與我們交談。致電該號碼需付費。如使用移動電話致電，則收費可能會較高。訪問 [humanservices.gov.au](https://humanservices.gov.au) 網站，點擊語言鏈接後可獲取用您的語言編寫的資訊。

### Croatian

Da biste s nama razgovarali na hrvatskom, nazovite **131 202**. Poziv se naplaćuje. Pozivi s mobitela se mogu naplaćivati po višoj tarifi. Za informacije na svom jeziku, posjetite [humanservices.gov.au](https://humanservices.gov.au) i izaberite tipku za strane jezike.

### Greek

Για να μιλήσετε μαζί μας στα Ελληνικά, καλέστε **131 202**. Ισχύουν τηλεφωνικές χρεώσεις. Για τις κλήσεις από κινητά τηλέφωνα ενδεχομένως να ισχύουν υψηλότερες χρεώσεις. Επισκεφθείτε την ιστοσελίδα [humanservices.gov.au](https://humanservices.gov.au) και επιλέξτε το κουμπί γλώσσας για να βρείτε πληροφορίες στη γλώσσα σας.

### Italian

Per parlare con noi in italiano, chiamate il numero **131 202**. Vigono tariffe di chiamata. Le chiamate da telefoni cellulari possono essere soggette a tariffe superiori. Visitate il sito [humanservices.gov.au](https://humanservices.gov.au) e selezionate il comando delle lingue per trovare informazioni nella vostra lingua.

### Korean

한국어로 문의하시려면 **131 202**번을 이용하십시오. 통화요금이 부과됩니다. 휴대전화로 통화하시는 경우 추가 요금이 부과될 수 있습니다. [humanservices.gov.au](https://humanservices.gov.au)를 방문하여 언어 버튼을 누르면 한국어로 된 정보를 찾아 보실 수 있습니다.

### Macedonian

За да зборовате со нас на македонски јавете се на **131 202**. Повикот се наплатува. Повиците од мобилни телефони може да се наплаќаат по повисока стапка. Одете на [humanservices.gov.au](https://humanservices.gov.au) и одберете го името на јазикот за да најдете информации на вашиот јазик.

### Maltese

Biex tkellimna bil-Malti ċempel **131 202**. Trid thallas tat-telefonata. Telefonati minn telefonijiet tal-mowbajl jistgħu jiġu ċċarġjati rata oġhla. Mur f'[humanservices.gov.au](https://humanservices.gov.au) u aghżel il-buttuna tal-lingwa biex issib tagħrif bil-lingwa tiegħek.

### Polish

Aby porozmawiać z nami po polsku, zadzwoń pod numer **131 202**. Rozmowa podlega opłatom telefonicznym. Rozmowy z telefonów komórkowych mogą być naliczane według wyższej taryfy. Odwiedź [humanservices.gov.au](https://humanservices.gov.au) i wybierz właściwy przycisk, by znaleźć informacje w języku polskim.

### Russian

Чтобы поговорить с нами по-русски, позвоните по номеру **131 202**. Это платный звонок. Плата за звонки с сотовых телефонов может взиматься по более высокому тарифу. Чтобы найти информацию на Вашем языке, зайдите на сайт [humanservices.gov.au](https://humanservices.gov.au) и нажмите на кнопку с языком.

### Serbian

Da biste razgovarali sa nama na srpskom, nazovite **131 202**. Позиви се наплаћују. Позиви са мобилних телефона могу да се наплате по вишој тарифи. Погледајте [humanservices.gov.au](https://humanservices.gov.au) и притисните дугме за ваш језик да бисте нашли информације на вашем језику.

### Spanish

Para hablar con nosotros en español, llame al **131 202**. Llamada tarifada. Llamadas desde teléfonos móviles pueden estar sujetas a cargos adicionales. Visite [humanservices.gov.au](https://humanservices.gov.au) y seleccione el botón de idioma para encontrar información en su lengua.

### Turkish

Bizimle Türkçe konuşmak için **131 202** numaralı telefonu arayınız. Aramalar ücretsizdir. Cep telefonlarından yapılan aramalar daha yüksek bir ücrete tabi olabilirler. Kendi lisanınızda bilgi bulabilmek için [humanservices.gov.au](https://humanservices.gov.au) internet sitesine girip ilgili lisanin düğmesine basiniz.

### Vietnamese

Muốn nói chuyện với chúng tôi bằng tiếng Việt, xin gọi số **131 202**. Các cuộc gọi sẽ bị tính cước phí. Gọi bằng điện thoại di động có thể bị tính theo giá cao hơn. Hãy vào trang mạng [humanservices.gov.au](https://humanservices.gov.au) và chọn nút ngôn ngữ để tìm thông tin bằng ngôn ngữ của quý vị.





# Aged Care Fees Income Assessment

## When to use this form

Most aged care services in Australia, including home care services, are subsidised through government payments to providers. You may be asked to contribute to the cost of your care if you can afford to do so.

The aged care fees income assessment asks for details about your income so we can advise you of your income tested aged care fees if:

- your Home Care Package has started on or after 1 July 2014, **or**
- your permanent residential aged care admission commenced before 1 July 2014.

**If you receive a means tested Australian income support payment from Centrelink, such as the:**

- **Age Pension, or**
- **Disability Support Pension, or**

**you receive from the Department of Veterans' Affairs, such as the:**

- **Service Pension, or**
- **Income Support Supplement**

**you do not need to complete this form. The Department of Human Services or the Department of Veterans' Affairs will have sufficient information to work out your income tested care fees.**

However, you can use this form to receive advice on your fees before commencing a Home Care Package. You can either complete your relevant details and sign this form or, if you receive a means tested income support payment from the Department of Human Services, you can contact the Department of Human Services on Freecall™ **1800 227 475** to trigger the pre-commencement assessment.

If you do not receive any means tested Australian income support payments, you will need to complete the entire form to obtain an income assessment.

You can choose **not** to provide your asset and income details and opt out of an assessment using this form. If you do not seek an assessment, you may be asked to pay the **maximum applicable fees**.

**If you receive a non-income tested payment from Centrelink, such as the:**

- **Age Pension (Blind)**
- **Disability Support Pension (Blind)**
- **Carer Allowance, or**
- **Mobility Allowance**

**you will need to complete the form as we will not have enough information about your income to complete the assessment.**

**If you receive a non-income tested payment from the Department of Veterans' Affairs, such as the:**

- **Disability Pension, or**
- **War Widow's Pension**

**and you do not receive the Income Support Supplement with these pensions, you will need to complete the form, as we will not have enough information about your income to complete the assessment.**

If you complete this form before commencing a Home Care Package, the initial fee notification advice you receive will be valid for 120 days unless there is a significant change in your circumstances in which case you will be required to notify us.

You should have received the booklet ***Information you need to know about Aged Care Fees Income Assessments*** attached to this form. In this claim, this booklet will be referred to as the **Information Booklet**. Please read this booklet before commencing the form.

### **Important information for Australian Ex-Prisoners of War and Victoria Cross recipients**

If you are an Australian Ex-Prisoner of War or Victoria Cross recipient you may not need to fill in this form. Please contact the Department of Veterans' Affairs on **133 254**, if you live in regional Australia call on Freecall™ **1800 555 254**.

**Note: This form is NOT to be used for respite care.**

## 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 on **133 254**, if you live in regional Australia call on Freecall™ **1800 555 254**.

For general information on fees and charges applying to aged care, go to My Aged Care website **myagedcare.gov.au** or call us on Freecall™ **1800 200 422**.

If you need specific advice on completing this form or on applying for financial hardship assistance, go to **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 **humanservices.gov.au/agedcare** or call us on Freecall™ **1800 227 475**.

## 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.

## Returning your form

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

- 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 lodge this form before you commence care (if possible) to make sure that your income for aged care fees purposes can be calculated as quickly as possible. If you commence your care without having an income assessment, you could be asked to pay the maximum aged care fees applicable.

## For more information

Go to [humanservices.gov.au/agedcare](https://humanservices.gov.au/agedcare) or call us on Freecall™ **1800 227 475**.

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

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

If you receive a payment from the Department of Veterans' Affairs call on **133 254**, if you live in regional Australia call on Freecall™ **1800 555 254**.

**Note:** Call charges may apply.

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

## 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 where you have agreed to that, or where it is required or authorised by law (including for the purpose of research or conducting investigations).

You can get more information about the way in which the department will manage your personal information, including our privacy policy, at [humanservices.gov.au/privacy](https://humanservices.gov.au/privacy)

**This page has been left blank intentionally.**

The person the assessment is for

**1** Your name (care recipient)

Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name

**2** Your gender

Male

Female

**3** Your date of birth

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

If you provide an email address or mobile phone number, you may receive electronic messages (SMS or email) from us. To read the Terms and Conditions, go to [humanservices.gov.au/em](http://humanservices.gov.au/em) or visit one of our Service Centres.

Your contact details

Phone number

Is this a silent number? No  Yes

Email

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

Provide your postal address or, if you will be nominating a contact person and you want your mail to be sent to them, write their postal address here.

Postal address

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

We may need to disclose the information you provide in this form to the Department of Social Services, the Department of Health, and/or the Department of Veterans' Affairs.

By agreeing to provide your income details to receive an aged care income assessment, you are giving us permission to disclose your information to the Department of Social Services, the Department of Health, and/or the Department of Veterans' Affairs.

Do you wish to provide your income details to receive an aged care income assessment?

No, I understand that I may  **Go to 40**  
have to pay the maximum  
aged care fees applicable

Yes  **Go to next question**

**7** Do you have a partner?

No  **Go to 13**

Yes  **Go to next question**

**8** Your partner's name

Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name

**9** Your partner's gender

Male

Female

**10** Your partner's date of birth

**11** Your partner's permanent address


CLK0SA456 1711

12 Does your partner live with you?

No

Yes

13 Do you (and/or your partner) have any dependent children under 16 years of age or dependent full-time students under 25 years of age in your care?

No  **Go to 15**

Yes  **Go to next question**

14 Details of the **youngest** dependent child/student in your care.

Child/student's family name

Child/student's first given name

Child/student's second given name

Child/student's gender

Male

Female

Child/student's date of birth

15 Are you (and/or your partner) currently receiving a payment from either Centrelink or the Department of Veterans' Affairs?

No  **Go to next question**

Yes  **Give details below**

**You**

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

**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

16 Please read this before answering the following question.

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

If you have such service, some Department of Veterans' Affairs payments (if you receive them) may be exempted from the income assessment for aged care fees purposes.

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

No  **Go to next question**

Yes  **Give details below**

**Tick appropriate box(es)**

I have qualifying service

My partner has qualifying service


17 Do you (and/or your partner) receive rental income?

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

**Note:** Net income means the rental income from the property less expenses incurred on the property such as interest on loans, management fees, rates, insurance and maintenance.

No  Go to next question

Yes  Give details below

 Attach documents showing details of the rental income for each property.

**Property 1**

Address of the property

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Postcode

Net rental income

\$ \_\_\_\_\_ per fortnight

Your share \_\_\_\_\_ % Partner's share \_\_\_\_\_ %

**Property 2**

Address of the property

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Postcode

Net rental income

\$ \_\_\_\_\_ per fortnight

Your share \_\_\_\_\_ % Partner's share \_\_\_\_\_ %

**Property 3**

Address of the property

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Postcode

Net rental income

\$ \_\_\_\_\_ per fortnight

Your share \_\_\_\_\_ % Partner's share \_\_\_\_\_ %

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

18 Are you (and/or your partner) in residential aged care?

No  Go to 21

Yes  Give details below

Name of the aged care home you (and/or your partner) live in

\_\_\_\_\_  
\_\_\_\_\_

19 Is one of the properties listed in question 17 your former home, that you (or your partner) left to enter care?

No  Go to next question

Yes  Give details below

**Tick one box**

Property 1

Property 2

Property 3

20 Did you (or your partner) agree to pay an accommodation charge, daily accommodation payment or an accommodation bond for residential care by periodic payments?

No  Go to next question

Yes  Give details below

Type of accommodation payment being paid

\_\_\_\_\_

Amount and how often are the periodic payments

\$ \_\_\_\_\_ per \_\_\_\_\_

 Attach a copy of your entry agreement showing details of your accommodation payment.

21 Do you receive a means tested income support payment from Centrelink or the Department of Veterans' Affairs (e.g. Age Pension or Service Pension)?

No  Go to 23

Yes  Go to next question

**22 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) income and financial assets. If your income or financial assets have changed since you last advised us you will need to complete questions 22 to 38 to provide the updated details.

**Note:** If you are assessed 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 answer questions 22 to 38.

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

No  **Go to 40**


Yes  **Go to next question**

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

**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  %

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



**24** Do 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, aged care refundable accommodation deposits, or aged care refundable accommodation contributions.

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.

**25** 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.

**26** Do 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.

**27** Do 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.

**28** Do 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 amount invested 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 amount invested 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.

**29** Do you (and/or your partner) have any funeral bonds/ funeral investments?

No  **Go to 31**

Yes  Give details below


<b>1</b> Name of company		
<input type="text"/>		
Name of product		
<input type="text"/>		
APIR code (if known)	Purchase price incl. instalments but not interest	
<input type="text"/>	\$ <input type="text"/>	
Current value as per latest statement	Your share	Partner's share
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

<b>2</b> Name of company		
<input type="text"/>		
Name of product		
<input type="text"/>		
APIR code (if known)	Purchase price incl. instalments but not interest	
<input type="text"/>	\$ <input type="text"/>	
Current value as per latest statement	Your share	Partner's share
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

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

**30** 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 contract.


**31** 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, including latest council rates notices for any real estate held by SMSF and SAF

<b>1</b> Name of institution/fund manager	
<input type="text"/>	
Name of fund	
<input type="text"/>	
Account balance	Amount (if any) that can be withdrawn as a lump sum
\$ <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 <input type="checkbox"/> Your partner <input type="checkbox"/>	

<b>2</b> Name of institution/fund manager	
<input type="text"/>	
Name of fund	
<input type="text"/>	
Account balance	Amount (if any) that can be withdrawn as a lump sum
\$ <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 <input type="checkbox"/> Your partner <input type="checkbox"/>	

<b>3</b> Name of institution/fund manager	
<input type="text"/>	
Name of fund	
<input type="text"/>	
Account balance	Amount (if any) that can be withdrawn as a lump sum
\$ <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 <input type="checkbox"/> Your partner <input type="checkbox"/>	

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

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

**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
<input type="text"/>	\$ <input type="text"/>

What you got for it	Your share	Partner's share
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

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
<input type="text"/>	\$ <input type="text"/>

What you got for it	Your share	Partner's share
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

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
<input type="text"/>	\$ <input type="text"/>

What you got for it	Your share	Partner's share
\$ <input type="text"/>	<input type="text"/> %	<input type="text"/> %

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.

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

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).

Do you (and/or your partner) receive income from any income stream products?

No  Go to next question

Yes  Give details below

 You (and/or your partner) will need to attach a completed, **Details of income stream product** form (SA330) or a similar schedule, for each income stream product. The form or similar schedule must be completed by your product provider or the trustee of the Self Managed Superannuation Fund (SMSF) or Small APRA Fund (SAF) or the SMSF administrator.

If you do not have this form, go to **humanservices.gov.au/forms** or call us on Freecall™ **1800 227 475**.

**1** 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  %

**33** *Continued*

**2** 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  %

**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.

**34** Do you (and/or your partner) receive payments from an authority or agency outside Australia?

**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.  
**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.

**35 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
- a 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.

Are you or have you (and/or your partner) been involved in a private trust in any of the ways detailed above, in the last 5 years?

No  **Go to 37**

Yes  Amount of income received in the last financial year (this is available from your personal income tax returns)

\$

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

No

Yes

**37 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.

Are you or have you (and/or your partner) been involved in a private company in any of the ways detailed above, in the last 5 years?

No  **Go to next question**

Yes  Amount of income received in the last financial year (this is available from your personal income tax returns)

\$

**38 Do you (and/or your partner) have any other assets (in or outside Australia) that you have not already advised us about on this form?**

**Include** cash, gold or other bullion.

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

No  **Go to next question**

Yes  **Give details below**

 Attach supporting documentation.

**1 Description of asset**

Description of asset		
[ ]		
Current market value	Amount owed	
[ ]	[ ]	
Currency if not AUD	Your share	Partner's share
[ ]	[ ] %	[ ] %

**2 Description of asset**

Description of asset		
[ ]		
Current market value	Amount owed	
[ ]	[ ]	
Currency if not AUD	Your share	Partner's share
[ ]	[ ] %	[ ] %

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

**39** Do you (and/or your partner) receive any other income 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.

## Contact person details

- 40** Do you want to nominate someone to help you deal with the Australian Government Department of Human Services or the Department of Veterans' Affairs for aged care income assessment purposes?

No  **Go to 49**

Yes  **Go to next question**

**41 Please read this before continuing.**

Make sure you have read the **Privacy and your personal information** on page 3 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 (refer to question 51).

### Statement

#### I certify that:

- I make this request voluntarily and understand that I can cancel this arrangement at any time by contacting the Department of Human Services or the Department of Veterans' Affairs.
- I authorise the Department of Human Services and the Department of Veterans' Affairs to release personal information about me to the person nominated at question 42.

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



Date

**42** Contact person's name

Mr  Mrs  Miss  Ms  Other

Family name

First given name

Second given name

**43** Contact person's gender

Male

Female

**44** Contact person's date of birth

**45** Contact person's permanent address

**46** Contact person's phone number

**47** What is your relationship to the contact person?

## 48 Contact person – to complete

Make sure you have read the **Privacy and your personal information** on page 3 of this claim.

### Statement

I (full name)

#### certify that:

- I understand that any information I obtain about the aged care recipient is confidential and cannot be disclosed to anyone without the permission of the aged care recipient.
- I understand that I can cancel the contact person arrangement at any time by contacting the Australian Government Department of Human Services.
- I understand that I must inform the Australian Government Department of Human Services or the Department of Veterans' Affairs of any changes to my address or to the aged care recipient's circumstances.

Contact person's signature



Date



## Checklist

**49** 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.*

- Documents with details of rental income   
*(If you answered Yes at question 17)*
- Accommodation payment agreement   
*(If you answered Yes at question 20)*
- Documents showing balances for bank, building society and credit union accounts   
*(if required for question 23)*
- Investment bond/debenture documents   
*(If you answered Yes at question 24)*
- 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 25)*
- Money on loan documents (if available)   
*(If you answered Yes at question 26)*
- Share certificates or latest statement for each shareholding LISTED on a stock exchange   
*(If you answered Yes at question 27)*
- Managed investment certificates or similar documents   
*(If you answered Yes at question 28)*
- Funeral bond contract(s)   
*(If you answered Yes at question 30)*
- Latest statements for approved deposit funds, deferred annuities, rollover funds and superannuation funds, tax returns and member's statements for SMSF and SAF funds, and latest council rates notices for real estate held by those funds   
*(If you answered Yes at question 31)*
- Latest schedules for income stream products or **Details of income stream product form (SA330)**   
*(If you answered Yes at question 33)*
- Documents with details of payments by authorities or agencies outside Australia   
*(If you answered Yes at question 34)*
- Documents with details on 'other' assets   
*(If you answered Yes at question 38)*
- Documents with details on 'other' income   
*(If you answered Yes at question 39)*

## Statement

**50 Please read this before continuing.**

Make sure you have read the **Privacy and your personal information** on page 3 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.

### Statement

Your Aged Care Service Provider may need access to your financial information to ensure you and your provider are receiving the correct payments and/or services under the *Aged Care Act 1997*.

Do you give your consent for the Australian Government Department of Human Services and/or the Department of Veterans' Affairs to give your current, former and future income and asset details to your current Aged Care Service Provider and any new Aged Care Service Provider you may engage?

Yes  My financial information will be provided to my Aged Care Service Provider.

I understand I may revoke my consent at any time by providing written advice to the Department.

No  My financial information will not be provided to my Aged Care Service Provider.

I understand I may need to discuss this with my Aged Care Service Provider.

### 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.

**If someone signs on your behalf**

**This person cannot be the person appointed as the contact person on page 16 UNLESS they are the aged care recipient's legal guardian or they hold the power of attorney for the aged care recipient.**

Full name

Address


---


---

Postcode

Contact phone number

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

A copy of the power of attorney order

A copy of the guardianship order

Other statement/details of authorisation

Make sure you have read the **Privacy and your personal information** on page 3 of this claim.


Legal guardian's or power of attorney's signature



Date

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

Second power of attorney's signature



Date

OFFICE USE ONLY

CRN

Centrelink date of receipt