



Financial Application Form

FINANCIAL DETAILS

Although you may have already completed an assets and income assessment from the Australian Government, we still require you to complete the information below. This will enable us to determine your likely costs and draw up an agreement for when you enter care. Your application with Gegeelup Aged Care Facility cannot proceed to the next stage without this information.

Whilst our staff are able to provide information on the fees and charges you may incur while a resident at GVI the financial implications of aged care can be quite complex. We recommend you seek financial advice from either Services Australia or an independent financial advisor.

Services Australia's free financial advice service 13 23 00

Services Australia Aged Care Specialists 1800 200 422

	Yes/ No
Are you recognised by the Department of Veteran Affairs as a POW?	
Do you have a spouse or a partner?	
If you own your house, will protected person be remaining in the house after you move into the facility. Protected people include resident's spouse or partner, a dependent child or student, A residential carer of at least two years standing and who is entitled to a Centrelink benefit on the day the resident moves into the aged care facility; or a close relative who has lived with the resident for at least five years and who is entitled to a Centrelink benefit on the day the resident moves into the aged care facility.	

Version	Uncontrolled once printed	Templates/Forms
Date 06.09.2023		Finance Assistant Leanne Lisser



Financial Application Form

INCOME

Please list the income you currently receive.

Type of Income	Annual Amount
Income support from the Australian Government (ie. Aged Pension)	
War Widow or Widower's pension or Disability Pension	
Overseas Pension	
Net income from rental properties	
Net income from businesses including farms	
Income from superannuation income streams	
Family trust distributions	
Dividends from private company shares	
Other:	

ASSETS

Type of Asset	Total Value
Family Home (market value less any mortgage)	
Investment properties or other properties	
Refundable accommodation contributions or deposits	
Bank, Building Society and or Credit Union accounts	
Cash	
Term Deposits	
Cheque Accounts	
Bonds or Managed Investments	
Shares (listed and unlisted) and or securities	
Gold and or other bullion	
Superannuation balances	
Private Trusts, family trusts and or private companies	
Gifted assets – pleas list any amounts gifted above \$10,000 in the past financial year and or \$30,000 in the last 5 financial years.	
Other (including cars, caravans, special collections etc):	

According to the legislation provided for in the Aged Care Act 1997 you are required to make a binding decision within 28 days from entry on whether you will be paying a RAD/ RAC/ DAP or DAC. (See your Admission Requirement Document for more information). We have software available to process various combinations and scenarios regarding the above to provide estimates of the potential costs. This can assist you in making some of these important decisions. Please contact our finance officer Leanne Lisser on 9788 7804 or finance@geegeelup.com.au for more information.

Version	Uncontrolled once printed	Templates/Forms
Date 06.09.2023		Finance Assistant Leanne Lisser



Financial Application Form

If applicable, do you intend on paying any of your Refundable Accommodation Deposit or the Refundable Accommodation Contribution?

Yes No

If yes, Will you be paying the full amount or a part payment?

Full Amount Part Payment

Please provide details:

If you are not paying a RAD or RAC we will require a security for payment. Please fill out the following

GUARANTOR 1	
Full Name	
Address	
Drivers Licence	
GUARANTOR 2	
Full Name	
Address	
Drivers Licence	

OR

Property Charged	
Registered Proprietor	
Property Address	
Title Particulars	

Please note that there is a minimum permissible asset level that must be retained by the resident after making any payment of their RAD/ RAC. Please speak with Services Australia for more information.

Have you lodged a Permanent Residential Aged Care Request for a Combined Assets & Income Assessment?

Yes No

If 'yes' and you have received a confirmation letter from Services Australia, please attach.

If 'no' please fill out the financial application form and attach to this application. Please also lodge this form with Services Australia as soon as possible. Please see our information package for more information.

Version	Uncontrolled once printed	Templates/Forms
Date 06.09.2023		Finance Assistant Leanne Lisser



Financial Application Form

I am aware that I must lodge my assets and income with Services Australia and will do so prior to admission.

Yes No

I accept that Geegeelup Village are not able to provide advice on my situation and it is my responsibility to seek financial advice.

Yes No

I certify that to the best of my knowledge all information in the application is correct.

Signed:

Full Name:

Date :

Version	Uncontrolled once printed	Templates/Forms
Date 06.09.2023		Finance Assistant Leanne Lisser