



# FINANCIAL APPLICATION FORM

Name of Applicant: \_\_\_\_\_

## 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 Geegeelup Village cannot progress to the next stage without this information.

As the financial implications of aged care can be quite complex, we also recommend you source external financial advice. Centrelink provide a free financial information service on 13 23 00.

If you have a partner, you should include your combined income, assets, and debts even if they are held in separate accounts or solely owned.

## INCOME

Please list all the current income you receive.

Type of Income	Annual Amount
Income support from the Australian Government (e.g. Aged Pension)	
War Widow or Widower 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:	

Are you recognised by the Department of Veteran Affairs as a POW?

Yes  No

## ASSETS

Do you presently own your home?

Yes  No

If yes, do you own your house solely or in a partnership with anyone else?

Solely  In partnership

If a partnership, please provide details:

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Does anyone reside in the home other than yourself?

Yes  No

If yes, please provide details:

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Please list the value of all your current assets.

Type of Asset	Total Dollar Value
Family Home (Market value less any mortgage)	
Investment properties or other properties	
Refundable Accommodation Deposits or Contributions	
Bank, building society and credit union accounts	
Cash	
Term Deposits	
Cheque Accounts	
Bonds or Managed Investments	
Shares (listed and unlisted) or securities	
Gold and other bullion	
Superannuation balances	
Private trusts, family trusts, and private companies	
Gifted assets - if you have gifted amounts above \$10,000 in the last financial year or \$30,000 in the last five financial years (with no more than \$10,000 in any financial year), include the amount above these limits as a financial asset.	
Other (including cars, caravans, special collections etc)	

#### DEBTS

Please list all of your current debts.

Type of Liability	Total Dollar Value
Credit card debt	
Personal Loans	
Mortgages	
Other	

According to the legislation provided for in the Aged Care Act 1997 you are required to make a binding decision within 28 days 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](mailto:finance@geegeelup.com.au) for more information.

Will you be paying any of 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:

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