



**Australian Government**  
**Department of Health and Ageing**

## **Permanent Residential Aged Care Request for an Assets Assessment**

Please read the accompanying *Information Booklet* before completing this form.

### **This form is used to:**

- apply for Australian Government financial assistance towards your residential aged care accommodation, and
- provide the necessary information so that your assets can be assessed by Centrelink or the Department of Veterans' Affairs (DVA). The results of this assessment will assist you in working out the amount of accommodation bond or charge an aged care provider can ask you to pay.

### **Important information:**

- It is not compulsory to have an assets assessment. Please see page 3 of the *Information Booklet* for further information.
- You do not need to have an assets assessment undertaken if you are intending to enter respite care.
- The legal authority for the use and disclosure of the information collected in this form is set out on page 7 of the *Information Booklet*.

### **Returning the form:**

- Please return the complete form to Centrelink or DVA. Full instructions on where to send it are on the back of this form.
- Please do not send this form to the Department of Health and Ageing.

# Important information about this form

## 'Skip' instructions

Depending on your answer to certain questions, you may be given a 'Skip' instruction. 'Skip' instructions allow you to skip past questions that are not relevant to you.

**You MUST follow all 'Skip' instructions that apply to you.**

'Skip' instructions generally follow a Yes or No answer box and look like this:

No	<input type="checkbox"/>	▶	<b>Skip to A6</b>
Yes	<input type="checkbox"/>		

If there is **no 'Skip' instruction** it means you need to **continue to the next question**.

## Do you need to complete all sections of this form?

Depending on your circumstances, you may not need to complete all sections of this form.

Some sections start with an 'introductory question' which looks like the one below. You must answer each of these introductory questions whether you think the section applies to you or not.


### *Do you need to complete this section?*

**Example of an introductory question leading in to each Section throughout the form. Do you need to complete this section?**

No  ▶ **Skip to Section X** — you **do NOT** need to complete this section


Yes  ▶ You **do** need to complete this section — please go to the next question

## Further information

 This information symbol and the accompanying text indicates where there is further information contained in the *Information Booklet*.

## Attaching documents

Depending on your answers you may be required to provide additional documentation with your form. If you do need to attach documents you will be told what to attach in a box like this:

 Please attach photocopies of documentation requested
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You do not need to provide the original documents — a photocopy is adequate.

## Section A Introductory questions

**A1** Do you have a current Aged Care Assessment Team (ACAT) **approval** for entry into permanent residential aged care?

No  Yes

**A2** Are you currently receiving care in a **hospital** awaiting entry into permanent residential aged care?

No  Yes  ▶ Name of the hospital

**A3** Have you been **offered a place** in permanent residential aged care?

No  Yes  ▶ When will this offer expire?

**A4** Are you currently **residing** in permanent residential aged care?

No  ▶ **Skip to A6**

Yes  ▶ When did you enter care?

Have you paid an accommodation bond in respect of your current admission to residential aged care?

No  Yes  ▶ What is the current balance of this bond? \$

**A5** Are you requesting this assets assessment for:

A **move** to a different aged care home

Your **current admission** to residential aged care  ▶ *Note: You need to complete this form based on your circumstances as at your date of entry into this aged care home.*

**A6** Are you currently receiving an **income support payment** (for example, Age Pension or Service Pension) from Centrelink or the Department of Veterans' Affairs (DVA)?

**i** 'Income support payments' are defined on page 2 of the *Information Booklet*.

No  Yes  ▶ Which agency do you receive the payment from?

Centrelink  ▶ Type of payment received

Centrelink Customer Reference Number

DVA  ▶ Type of payment received

DVA file number

**A7** Are you (and/or your partner) a veteran or dependant of a deceased veteran?

No  Yes  ▶ 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? No  Yes

Japanese forces during World War II? No  Yes

If you (and/or your partner) received one of these payments, the compensation payment amount will be **deducted** from the value of your assets.

## Section B Applicant details

**B1** Your full name

Title (e.g. Mr, Mrs, Miss, Ms)

Surname or family name

Given names

**B2** Sex

Male

Female

**B3** Date of birth

**B4** Home address

If you are already in residential aged care or are in a hospital awaiting entry to a residential aged care home, you should write down your **previous** home address.

**B5** Address for correspondence (if different from above)

If you are already in residential aged care or in a hospital awaiting entry to an aged care home, and you wish your correspondence to be sent directly to you there, you should provide your hospital or aged care home address here.

**B6** Contact phone numbers

Daytime

STD

Mobile

**B7** Do you have a **partner**?



'Partner' is defined on page 5 of the *Information Booklet*.

No



**Skip to Section C**

Yes

**B8** Your partner's full name:

Title (e.g. Mr, Mrs, Miss, Ms)

Surname or family name

Given names

**B9** Your partner's date of birth

**B10** Your partner's residential address

## Section C Contact person

### *Do you need to complete Section C?*

Do you want to nominate someone (other than yourself) whom Centrelink or DVA can contact about this aged care assets assessment?

No

**Skip to Section D** — you **do NOT** need to complete this section.

Yes

You **do** need to complete this section — please go to question C1 below.

#### **C1** Who do you want to nominate?

My **partner**

Your partner's daytime  
phone number

STD

Mobile

**Skip to Section D** — you have completed this section.

**Someone else**

Please give their details

Title (e.g. Mr, Mrs, Miss, Ms)

Surname or  
family name

Given names

Address for  
correspondence

STATE

POSTCODE

Daytime phone number

STD

Mobile

Their relationship to  
you (e.g. son, friend)

*Note:* If you would like to nominate more than one contact person, please provide a separate sheet with the other person's details.

## Section D Household contents and personal effects

*Note:* Even if Centrelink or DVA already has information on the value of your household contents and personal effects, it is important that you update this information to take account of any depreciation or increase in value.

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**D1** Do you want to provide an estimate of the net market value (resale value) of your (and your partner's, if applicable) household contents and personal effects?

No

The value of your household contents and personal effects will be taken to be \$5,000.

***Skip to Section E***

Yes

What is the estimated net market value\* of your (and your partner's, if applicable) household contents and personal effects?

This estimate may be higher or lower than \$5,000.

\$

\* The market value is **NOT the replacement or insured value**, it is the amount you would get if you sold the item(s).

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## Section E Your home

### *Do you need to complete Section E?*

Have you (and/or your partner):

- owned or part-owned a home (including a mobile home or a unit in a retirement village) in the past 2 years

OR

- lived in a retirement village unit under another arrangement in the past 2 years, for example, you paid an amount of money under a licensing agreement, or other agreement, for the right to live there (an entry contribution)?

No



**Skip to Section F** — you **do NOT** need to complete this section.

Yes



You **do** need to complete this section — please go to question E1 below.



Page 4 of the *Information Booklet* tells you how your home is treated for the assets assessment.

*Note:* If, in the past 2 years, your home was part of a retirement village, and you (and/or your partner) paid an amount for the right to live in the retirement village (an entry contribution), any part of this amount that has been, or will be, repaid to you by the retirement village needs to be considered in the assets assessment.



Please refer to page 4 of the *Information Booklet* for information about Retirement village homes.

**E1** In the past 2 years, have you (and/or your partner) lived in a **retirement village**?

No

Yes



**Skip to E22**

**E2** Do you (and/or your partner) **currently** own (or part-own) a home?

*Note:* For the purposes of this question, disregard any financial interest held by a financial institution in the form of a mortgage.

No



**Skip to E6**

Yes

**E3** Is your home a **mobile** home such as a caravan or a boat (or similar dwelling)?

No



**Go to E4**

Yes



What is the current market value of the home?

\$



Please attach documentation indicating the current market value of the home.

Do you have a **partner** who lives in the mobile home?

No



**Skip to E30**

Yes



**Skip to Section F** — you have completed this section.

**E4** Do you have a **partner** who lives in your home?

No

**Skip to E8**

Yes

**E5** Is the **land** on which your home stands more than 2 hectares (5 acres)?

No

**Skip to Section F** — you have completed this section.

Yes

*Note:* If you (and/or your partner) have owned or part-owned a home (including a mobile home) in the past 2 years, but you do not own it now, the value of your interest in that former home is used to work out if you are eligible for government assistance.

**E6** Did you (and/or your partner) **sell** your home in the past 2 years?

No

**Go to E7**

Yes

Date the home was sold

Did you have a partner at the time the home was sold?

No

Yes

What was the total amount you (and your partner, if applicable) received?

\$

What was the total amount you (and your partner, if applicable) incurred in finalising the sale of the home, for example, a mortgage, taxes?

\$



Please attach documentation verifying the:

- sale price of the home, for example, a solicitor's settlement letter or sale contract, and
- the amount of expenses incurred (if any) in finalising the sale of the home.

**Skip to Section F** — you have completed this section.

**E7** Did you (and/or your partner) **transfer the title** of your home in the past 2 years?

No

**Go to E8**

Yes

Date the title was transferred

Did you have a partner at the time the title of the home was transferred?

No

Yes

What was the market value of your (and your partner's, if applicable) interest in the home at the time of transfer?

\$



Please attach documentation verifying the value of the home, for example, a solicitor's settlement letter or transfer document.

**Skip to Section F** — you have completed this section.

## Details for valuation of your home

**E8** What is the **address** of your home?

STATE	POSTCODE

**E9** What **type** of property is your home?

House

Part of a farming property

Townhouse (including duplex/triplex)

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

Unit/flat  ▶ How many units/flats are in the block?

Other  ▶ Please specify

**E10** What is the **share** of ownership (as indicated on the property title)?

*Note:* For the purposes of this question, disregard any financial interest held by a financial institution in the form of a mortgage.

Self  %

Partner  %

Others  %

**E11** What is the **legal description** (lot/section number) of the land?

*Note:* This information can be found on a rates notice.

Lot

Section

**E12** What is the **area/dimensions** of the land?

*Note:* You do not need to answer this question if your home is a unit or flat.

Square metres, or

Hectares, or

Acres

**E13** What is your **estimate** of the **current market value** of the property, including land and buildings?

\$

*Note:* You do not need to have the property professionally valued. We may have an approved government valuer do this at no cost to you.

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**E14** What are the **details** of your home?

Number of bedrooms

Number of bathrooms

Number of garages

Approximate age of the home

 YEARS

Floor area

 SQUARES

OR

 SQUARE METRES

Your assessment of the condition of the home:

Good

Fair

Poor

Type of construction: Exterior (e.g. brick, timber, fibro)

Roof (e.g. iron, tiled)

Is there anything that may affect the value of the home  
(e.g. swimming pool, new kitchen, no off-street parking)?

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**E15** Is your home part of a **farm property**?

No



**Skip to E30**

Yes

## Farm information

This information is needed by the valuer to verify the value of the property in order to determine the value of the home on it.

**E16** What is the farm property **primarily** used for (e.g. grazing, wheat, hobby)?

**E17** Is the farm property currently **operational/viable**?

No  Yes

**E18** Is it possible to **subdivide** the farm property or farm home?

No  Yes

**E19** Are there any **improvements** on the farm property?

No  Yes  ▶ Please complete the following table

Type	Number	Description	Age (years)
Hay shed			
Machinery shed			
Shearing shed			
Grain shed			
Silos			
Cattle/sheep yard			

**E20** Is there any **fencing** on the property?

No  Yes  ▶ Type

Condition

**E21** Please list any other **constructions** located on the property (e.g. workers' quarters, manager's house)


**Skip to E30**

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## Retirement village home

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**E22** Do you currently live in a **retirement village**?


No   **Skip to E26**

Yes

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**E23** Do you have a partner living with you in the retirement village?

No

Yes   **Skip to Section F** — you have completed this section.

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**E24** What amount will be paid to you (and/or your partner) when you leave the retirement village (from the sale of the unit, or refund of amount paid under the licensing agreement, or refund of entry contribution)?


\$




Please attach supporting documentation showing the amount payable to you

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**E25** Do you have an outstanding loan which was incurred to purchase the unit or for the right to live in the retirement village?

No   **Skip to Section F** — you have completed this section.

Yes   What is the amount owing on the loan?

\$



Please attach a copy of the most recent statement for the loan

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**Skip to Section F** — you have completed this section.

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**E26** When did you leave the retirement village?

/  /


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**E27** Did you have a partner living with you in the retirement village?

No

Yes   Is your partner still living in the retirement village?

No

Yes   **Skip to Section F** — you have completed this section.

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**E28** What amount has been, or will be, paid to you (and/or your partner) as a result of your departure from the retirement village?

*Note:* This could be an amount from the sale of the unit, a refund of an amount paid under the licensing agreement, or a refund of an entry contribution. If you had a partner at the time this amount became payable, your share of this amount will be 50% of the total.

\$



Please attach supporting documentation showing the amount payable

When was it paid to you, or when is it due to be paid?

/  /

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**E29** At the time you left the retirement village, did you have an outstanding loan which was incurred to purchase the unit or for the right to live in the retirement village?

No  Yes  ► What was the amount owing on the loan?

\$




Please attach a copy of the most recent statement for the loan

## Occupants of your home

This information is needed to decide if your home can be exempted from the assets assessment.

**E30** Do you have a **dependent child** who lives in your home?

 'Dependent child' is defined on page 5 of the *Information Booklet*.

No  Yes   Please give details of your dependent child

Surname or family name

Given names

Date of birth

/ /

**E31** Have you had someone who has **cared for you** who has lived in your home for the **past 2 years** and is currently **eligible** to receive an income support payment from Centrelink or the Department of Veterans' Affairs (for example, Age Pension or Service Pension)?

*Note:* A Carer's Allowance is not an income support payment.

No  Yes

**E32** Has a **close relation** (either your mother, father, sister, brother, child or grandchild) lived in your home for the **past 5 years** who is currently **eligible** to receive an income support payment from Centrelink or the Department of Veterans' Affairs (for example, Age Pension or Service Pension)?

No  Yes

**E33** If you have answered **Yes** to either (or both) **E31** or **E32**, it is necessary for Centrelink or DVA to verify your carer's or close relation's occupation of your home and their eligibility to receive an income support payment.

### Consent by carer or close relation

I consent to Centrelink or the Department of Veterans' Affairs using information collected from me for the purpose of determining my eligibility for an income support payment for the additional purpose of determining whether the applicant is a concessional or assisted resident under the *Aged Care Act 1997*.

Signature of carer or close relation



Date

Surname or family name

Given names

Date of birth

Centrelink or DVA reference number

Relationship to applicant

Daytime phone number

STD

Mobile

		/ /
		/ /


## Section F Debts


### *Do you need to complete Section F?*

**Do you (and/or your partner) have any debts that you currently owe, for example mortgages, loans and credit cards?**

Do not include any:


- future or anticipated debts, or
- debts to be deducted from the sale price of a retirement village unit, or an entry contribution refund, that you have already included in Section E.

No   **Skip to Section G** — you **do NOT** need to complete this section.

Yes   You **do** need to complete this section — please go to question F1 below.

*Note:* Under the assets assessment, debts, charges and encumbrances on assets that you (and/or your partner) hold will be **deducted** from the net value of your assets.

**F1** Do you (and/or your partner) have any **mortgages**?


No  Yes   Please give details below

Address of property secured by the mortgage	Amount owing
	\$
	\$
	\$
	\$



Please attach a copy of the most recent statement for each mortgage

**F2** Do you (and/or your partner) have any **motor vehicle/boat/caravan loans**?

No  Yes   Please give details below

Details of the motor vehicle/boat/caravan secured by the loan	Amount owing
	\$
	\$
	\$
	\$



Please attach a copy of the most recent statement for each loan

**F3** Do you (and/or your partner) have any **outstanding credit card debts or other personal loans**?

No  Yes  ▶ Please give details below

Creditor	Amount owing	Your share	Partner's share
	\$	%	%
	\$	%	%
	\$	%	%
	\$	%	%



Please attach a copy of the most recent statement for each loan

**F4** Do you (and/or your partner) have any **other debts** not already listed on this form, for example, household and medical bills owing?

No  Yes  ▶ Please give details below

Creditor	Amount owing	Your share	Partner's share
	\$	%	%
	\$	%	%
	\$	%	%
	\$	%	%



Please attach supporting documentation

## Section G Other assets (including investment properties)

### *Do you need to complete Section G?*

**Do you currently receive an income support payment from Centrelink or the Department of Veterans' Affairs (for example, Age Pension or Service Pension)?**

No  ▶ You **must** complete this section — please go to question G1 below.

Yes  ▶ Centrelink or DVA already have details about your (and your partner's) assets.  
**Do you need to advise Centrelink or DVA of any changes?**

No  ▶ **Skip to Section H** — you **do NOT** need to complete this section.

Yes  ▶ You only need to answer those questions in Section G where you need to give new information to Centrelink or DVA.

*Note:* If you are regarded as **blind** for income support payment purposes and you have not been means tested by Centrelink or DVA, you must complete this section.

*Note:* If you need more space for any of your information, please attach a separate sheet with the details.

#### **G1** Do you (and/or your partner) have any **deposits with financial institutions?**

This includes bank accounts, building society/credit union accounts, term deposits or money held in development funds.

*Note:* If you receive a payment from Centrelink or DVA, please include details of the account your payment is paid into.

No  Yes  ▶ Please give details below

Name of institution	Account or term deposit number	Account balance	Your share	Partner's share
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%




Please attach proof of all account balances (e.g. copies of ATM slips, statements, passbooks)

**G2** Do you (and/or your partner) have any **investment bonds or debentures**?

No  Yes  ▶ Please give details below


Type of investment	Name of company	Current amount invested	Your share	Partner's share
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%

 Please attach a document which gives details for each investment

**G3** Do you (and/or your partner) **have money on loan** to anyone including family members, relatives and friends?

No  Yes  ▶ Please give details below

Who is it on loan to? (e.g. son, daughter)	Date loaned	Amount owing	% loaned by you	% loaned by partner
	/ /	\$	%	%
	/ /	\$	%	%
	/ /	\$	%	%
	/ /	\$	%	%
	/ /	\$	%	%

 Please attach a document which gives details of the loan, if available

**G4** On or after 10 May 2006, have you (and/or your partner) **given away, sold for less than their market value, or surrendered** a right to any cash, assets, property or income?

This includes forgiven loans and shares in private companies.


No  Yes  ▶ Please give details below

What you gave away or sold for less than its market value (e.g. money, car, land, farm)	Date given away or sold	What it was worth	What you got for it	Gift made by:	
				You	Partner
	/ /	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	/ /	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	/ /	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	/ /	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>
	/ /	\$	\$	<input type="checkbox"/>	<input type="checkbox"/>

**G5** Do you (and/or your partner) own any **shares, options, rights or convertible notes**?

No  Yes  ▶ Please give details below

Name of company	Number of shares	Your share	Partner's share
		%	%
		%	%
		%	%
		%	%
		%	%
		%	%
		%	%


 Please attach a copy of the latest statement for each share holding

**G6** Do you (and/or your partner) have any **managed investments**?

This includes unit and account based trusts, listed trusts, master trusts, insurance and friendly society bonds.

No  Yes  ▶ Please give details below


Name of product	Policy number	Number of units	Your share	Partner's share
			%	%
			%	%
			%	%
			%	%
			%	%

 Please attach documents which show details for each investment (e.g. certificate with the number of units or account balance)

**G7** Do you (and/or your partner) have any **life insurance policies** that can be cashed in?

No  Yes  ▶ Please give details below


Name of insurance company	Policy number	Surrender value	Your share	Partner's share
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%

 Please attach a copy of the policy document and the latest statement for each policy

**G8** Do you (and/or your partner) have any **superannuation assets** from which lump sums can be withdrawn?

No  Yes  ▶ Please give details below


Name of institution/ fund manager	Name of fund	Account balance	Your share	Partner's share
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%

 Please attach a copy of the latest statement for each fund

**G9** Do you (and/or your partner) have any **income stream products** from which lump sums can be withdrawn?

No  Yes  ▶ Please give details below

Name of institution/ fund manager	Name of fund	Account balance	Your share	Partner's share
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%
		\$	%	%


 Please attach a copy of the latest statement for each fund

**G10** Do you (and/or your partner) own any **motor vehicles, boats, caravans or trailers**?

No  Yes  ▶ Please give details below

Make	Model	Year	Market value*	Your share	Partner's share
			\$	%	%
			\$	%	%
			\$	%	%
			\$	%	%
			\$	%	%

\* The current market value of your vehicle is the amount you would get if you sold it. It is not the insured or replacement value. If you have an outstanding loan or debt against the vehicles, please make sure you have provided the loan/debt information in Section F.

 Please attach a copy of supporting documents, if available (e.g. insurance policy schedules)

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**G11** Do you (and/or your partner) have an interest in a **business** (this includes a **farm**)?

No

Yes

▶ What is your estimate of the total value of the interest?

\$

(For a farming business, the value of grazing animals, produce, crops, plant and machinery should be included.)



Please attach a recent balance sheet which states your (and/or your partner's) current interest in the business.

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**G12** Do you (and/or your partner) have a current interest in a **private company**?

No

Yes

▶ What is your estimate of the total value of the interest?

\$

You will be asked to provide more details at a later date.

*Note:* 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, 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 major shareholder to act in accordance with your wishes.

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**G13** Do you (and/or your partner) have a current interest in a **private trust**?

No

Yes

▶ What is your estimate of the total value of the interest?

\$

You will be asked to provide more details at a later date.

*Note:* 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
- are a trustee
- are a shareholder or director of the trustee company
- are a beneficiary or included among the categories of beneficiaries
- 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.

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**G14** Do you (and/or your partner) have any special **collections** such as stamps, art work or antiques?

No  Yes  ▶ Please give details below

What is your estimate of the total value of these collections? \$



Please attach copies of valuation certificates or insurance valuations (if available).

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**G15** Do you (and/or your partner) have any **other assets** (apart from real estate) not declared elsewhere on this form?

No  Yes  ▶ What is the nature of these assets/investments

What is your estimate of the value of these assets/investments? \$



Please attach supporting documentation (if available)

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**G16** Do you (and/or your partner) have any **real estate properties other than your home**?

No  ▶ **Skip to Section H** — you have completed this section.

Yes  ▶ How many real estate properties do you (and/or your partner) own or have an investment in?

**Please note:** If you have more than one investment property, you will need to photocopy and complete pages 23 – 25 for each property.

## Investment property

**Remember** — If you have more than one investment property, you will need to photocopy and complete pages 23 – 25 for each property.

**G17** What is the **address** of the property?

STATE	POSTCODE

**G18** What **type** of property is your investment property?

Vacant land

House

Townhouse (including duplex/triplex)

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

Unit/flat  ► How many units/flats in block?

Farm

Hobby farm

Retail premises

Commercial premises

Industrial premises

Other  ► Please specify

**G19** What is the **share** of ownership (as indicated on the property title)?

*Note:* For the purposes of this question, disregard any financial interest held by a financial institution in the form of a mortgage.

Self  %

Partner  %

Others  %

**G20** What is the **legal description** (lot/section number) of the land?

*Note:* This information can be found on a rates notice.

Lot

Section

**G21** What is the **area/dimensions** of the land?

*Note:* You do not need to answer this question if the property is a unit or flat.

Square metres, or

Hectares, or

Acres

**G22** What is your **estimate** of the **current market value** of the property, including land and buildings?

*Note:* You do not need to have the property professionally valued. We may have an approved government valuer do this at no cost to you.

**G23** What are the **details** of the main building?

There are no buildings on the property

Number of bedrooms

Number of bathrooms

Number of garages

Approximate age of the home  YEARS

Floor area  SQUARES OR  SQUARE METRES

Your assessment of the condition of the home: Good  Fair  Poor

Type of construction: Exterior (e.g. brick, timber, fibro)

Roof (e.g. iron, tiled)

Is there anything that may affect the value of the home (e.g. swimming pool, new kitchen, no off-street parking)?

**G24** Is the property a **farm/hobby farm**?

No

**Skip to G31**

Yes

## Investment property — Farm information

**G25** What is the farm property **primarily** used for? (e.g. grazing, wheat, hobby)

**G26** Is the farm property currently **operational/viable**?

No  Yes

**G27** Is it possible to **subdivide** the farm property or farm home?

No  Yes

**G28** Are there any **improvements** on the farm property?

No  Yes  ▶ Please complete the following table

Type	Number	Description	Age (years)
Hay shed			
Machinery shed			
Shearing shed			
Grain shed			
Silos			
Cattle/sheep yard			

**G29** Is there any **fencing** on the property?

No  Yes  ▶ Type   
Condition

**G30** Please list any other **constructions** located on the property  
(e.g. workers' quarters, manager's house)


## Rental from investment property

This information is needed by the valuer to verify the value of your investment property.

**G31** Is rental income **received** from the property?

No  ▶ **Skip to Section H** — you have completed this section.  
Yes

**G32** What is the **gross amount** of rent received for the property?

\$  PER

**G33** What are the details of the **lease arrangement** (e.g. long term, monthly)?

**G34** What is your **estimate** of the **annual outgoings** (e.g. rates, maintenance)?

\$

**G35** Does the **tenant** pay the outgoings?

No  Yes

## Section H Document checklist

You may have been asked to provide documents (copies only) to support your answers to some of the questions.

Please complete this checklist to make sure you have attached all the relevant documents.

### Section E – Your home

- E3**  Current market value of mobile home – documents indicating the current market value
- E6**  Sale of the home – supporting documentation such as a solicitor’s settlement letter or the sale contract, and (if applicable) documents verifying the amount of expenses incurred in finalising the sale
- E7**  Transfer of the home – supporting documentation such as a solicitor’s settlement letter or transfer document
- E24**  Amount payable on departure from retirement village – supporting documentation showing the amount
- E25**  Outstanding loan for retirement village unit or entry contribution – most recent statement
- E28**  Amount paid or payable on departure from retirement village – supporting documentation showing the amount
- E29**  Outstanding loan for retirement village unit or entry contribution – most recent statement

### Section F – Debts

- F1**  Mortgages – most recent statements
- F2**  Motor vehicle/boat/caravan loans – most recent statements
- F3**  Credit card debts or other personal loans – most recent statements
- F4**  Other debts – supporting documentation

### Section G – Other assets

- G1**  Deposits with financial institutions – proof of all account balances such as ATM slips, statements, passbooks
- G2**  Investment bonds or debentures – supporting financial statements
- G3**  Money on loan – supporting documentation
- G5**  Shares, options, rights, convertible notes – supporting financial statements
- G6**  Managed investments – supporting financial statement showing the current unit holdings and account balance
- G7**  Life insurance policies – most recent policy schedules
- G8**  Superannuation assets – most recent statements
- G9**  Income streams – most recent statements
- G10**  Motor vehicles, boats, caravans or trailers – supporting documents such as an insurance policy schedule
- G11**  Business – recent balance sheet
- G14**  Special collections – valuation certificates or insurance valuations
- G15**  Other assets – supporting documentation

## Section J Declaration and consents

**J1** I **declare** that the information in this form is complete and correct. I also understand that giving false or misleading information is a serious offence.

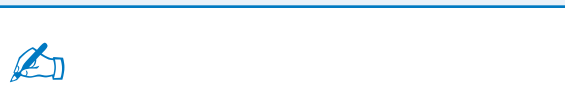
I **consent** to the Department of Health and Ageing:

- advising Centrelink or the Department of Veterans' Affairs (DVA) that I am currently, or have previously been, a concessional or an assisted resident (if this is the case), and
- providing other information in relation to a previous assets assessment that is required for the current assessment.

I **consent** to Centrelink or DVA:

- using information which has been collected from me for the purpose of determining my eligibility for an income support payment for the additional purpose of determining whether I am eligible to be a concessional or assisted resident under the *Aged Care Act 1997*
- using information collected from me for the purpose of determining whether I am eligible to be a concessional or assisted resident under the *Aged Care Act 1997* for the additional purpose of updating information held by Centrelink or DVA in relation to my eligibility for an income support payment
- disclosing personal information about me to my nominated contact person (if any)
- disclosing information collected from me for the purpose of determining whether I am eligible to be a concessional or assisted resident under the *Aged Care Act 1997* to the Department of Health and Ageing and Medicare Australia (acting on behalf of the Department of Health and Ageing)
- advising aged care homes, to which I have applied to become a resident, of the progress of my assets assessment, if they request this information from Centrelink or DVA. My consent does not include advising aged care homes about the outcome of my assessment.

**Signature** of applicant  
(or person authorised to sign)



Date

**J2** If this form was signed on **behalf** of the applicant, please provide the authorised person's details

Title (e.g. Mr, Mrs, Miss, Ms)

Surname or family name

Given names

Address

STATE	POSTCODE
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Daytime phone number

STD	
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Mobile

Relationship to applicant



Please attach the authorisation  
(tick whichever is applicable):

A copy of the power of attorney

A copy of the administration order  
or financial management order

*Note:* If you have any questions regarding the completion of this form, please contact Centrelink or DVA.

**Centrelink** 1800 227 475

**DVA** 1300 550 452 or 133 254

If calling from regional Australia phone 1800 555 254

# Where to post the completed form and supporting documentation

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## Centrelink

Post your form and supporting documentation to **Centrelink** if:

- you receive an **income support payment** (such as an Age Pension or a Disability Support Pension) from Centrelink, or
- you **do not** receive an income support payment from either Centrelink or the Department of Veterans' Affairs.

<b>All States/Territories</b>	Centrelink Aged Care Assets Assessments PO Box 2771 CHELTENHAM VIC 3192
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## Department of Veterans' Affairs (DVA)

Post your form and supporting documentation to the **DVA office in your State or Territory** if you receive an **income support payment** (such as a Service Pension or an Income Support Supplement) from DVA.

<b>ACT/NSW</b>	Department of Veterans' Affairs Aged Care Assets Assessments GPO Box 3994 SYDNEY NSW 1141
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<b>QLD</b>	Department of Veterans' Affairs Aged Care Assets Assessments GPO Box 651 BRISBANE QLD 4001
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<b>SA/NT</b>	Department of Veterans' Affairs Aged Care Assets Assessments GPO Box 1652 ADELAIDE SA 5001
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<b>TAS</b>	Department of Veterans' Affairs Aged Care Assets Assessments GPO Box 481 HOBART TAS 7001
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<b>VIC</b>	Department of Veterans' Affairs Aged Care Assets Assessments GPO Box 87A MELBOURNE VIC 3001
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<b>WA</b>	Department of Veterans' Affairs Aged Care Assets Assessments GPO Box F352 PERTH WA 6001
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