



ALTERIS FINANCIAL
GROUP

Specialised financial advice for the move to aged care

With you **every step of the way**

Wealth / Accounting / Lifestyle **Care**

Moving to residential care



Specialised aged care financial advice helps families make informed choices at each stage of their journey and achieve their preferred outcome with support at a very emotional and stressful time. We assist by:

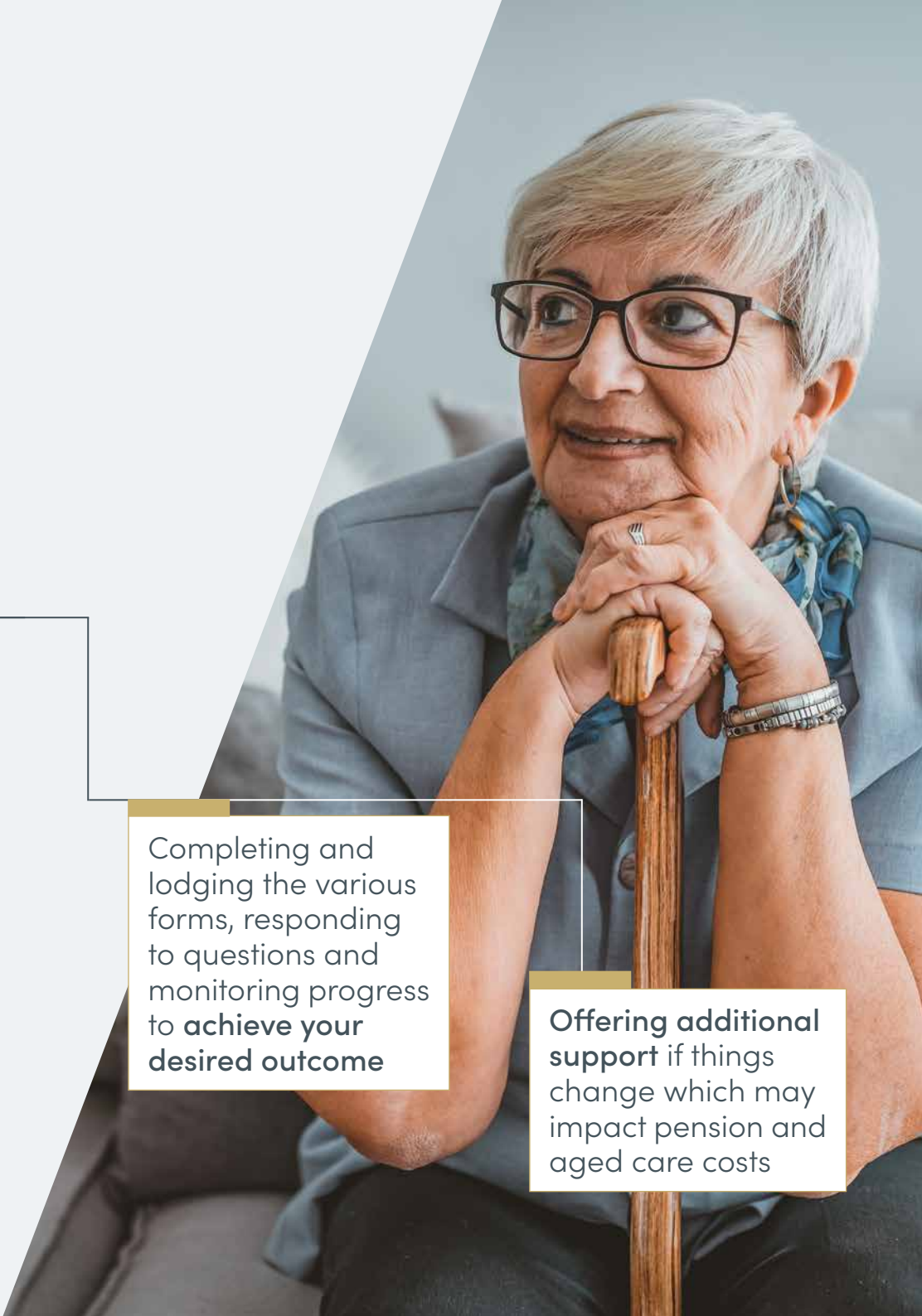
Explaining the aged care system to help you find the right home

Organising finances for now and the future

Working out the costs and the choices you have to cover them

“I have sincerely enjoyed working with you over these last few months. You have made my situation so easy with the help and support you have provided to the family, so again thank you indeed for the time you have spent on dad’s affairs.”

Brett, son



Completing and lodging the various forms, responding to questions and monitoring progress to **achieve your desired outcome**

Offering additional support if things change which may impact pension and aged care costs

Making the move with confidence



Our Lifestyle and Care team helps you make the best choices for your loved one's care, financial needs and wellbeing, and supports you throughout the journey.

When you contact us

We will first understand your family's situation and then provide some initial thoughts on how we can assist and what's involved if you choose to proceed and meet with us.

First meeting

During our first meeting we will get to know each other better. This is an opportunity to talk about the options available and how they might impact your family initially and over the longer term.

Preparing your options

We will research the possibilities to work through several options that may apply to your situation. Our aim is to:

- Help you feel comfortable with the financial decisions to be made when moving to care
- Show you what the pension benefits and aged care costs are likely to be based on the financial decisions you make
- Help you have a clear understanding of how the aged care costs can be paid for
- Identify any estate planning considerations to help achieve desired outcomes.



“You truly have been our saviour with all your assistance and compassion regarding mum and dad’s affairs, we can’t thank you enough. Through all the sadness and stress we have endured, you gave us peace of mind that everything would sort out. I can honestly say I have no hesitation in recommending you and your team for anyone needing aged care financial advice.”

Jane, daughter

Explaining your options

We will talk through those options in detail with you, answering any questions you have and, if needed, adjust them to better fit your needs. Sometimes this may involve an additional report preparation and follow-up meetings. Once we’ve agreed on the solution that will work best, we can talk about next steps.

Supporting you through to moving in

Completing the paperwork and navigating all the systems and processes can be time-consuming and complicated.

We have a dedicated team who works with the facility and Centrelink on this journey that will take anywhere from 3 to 9 months as we work through the system. From filling in the forms correctly to checking calculations that are made at assessment, we’ve helped thousands of families along the way.

Our clients tell us they feel a great relief during this time which is often already emotionally and physically overwhelming.

Why choose Alteris?



From the beginning of their journey to after moving in, we have helped thousands of families make their aged care decisions with complete confidence during an emotional time.

Our dedicated team has helped families understand the financial costs of moving to aged care while ensuring the whole process runs smoothly.

As things change, you may need to make new decisions over the years.

We're always just a phone call away and can advise you further.

We provide aged care financial advice education and training for care facilities and other professionals, sharing our knowledge and actively participating in industry body events.

These relationships together with our team of research, training, and compliance specialists, help us to achieve the best outcomes for our clients.

“Thank you so much for all your work in getting us to this point. We would never have achieved the final result without your expertise and thoughtfulness. While it was never going to be an easy journey, both Mum and Dad are enjoying the cares provided and the facilities at their new aged care home.”

Steve, son

“We truly do not have the words to thank you for all you have done. We could not have got by without you both and we are so grateful for all your assistance. To see mum settled into permanent residential care in a facility she loves means everything to us and we thank you from the bottom of our hearts.”

Judy and Bill, daughter and son-in-law

“Having worked at management level all my life, I was sure I could conquer all associated with my need to move into aged care. How wrong was I ... I will be forever grateful to you for making my journey into aged care living less daunting and knowing all planning for the future and paperwork is in order.”

Janice Jones, aged care resident

1000s
families
helped

**Dedicated
team**

with specialised
aged care
knowledge

**Industry
relationships**

to help families
with their
move

Let's work together

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