

Checklist: Aged Care Planning

Use this checklist to track your progress as you plan for your future home.

Phase 1: Reflection & Preparation

- ☐ **Define My Priorities:** I have thought about what's important to me in a home (location, lifestyle, care needs).
- ☐ **Talk to My Family:** I have had an initial conversation with my family/Enduring Guardian about the possibility of future care needs.
- ☐ **Seek Financial Advice:** I have scheduled an appointment with a financial advisor specialising in aged care to understand the costs.

Phase 2: Research & Visits

- ☐ **Use My Aged Care:** I have used the My Aged Care website to research and shortlist potential facilities in my area.
- ☐ **Ask for Recommendations:** I have spoken to my GP and trusted friends for their insights on local facilities.
- ☐ **Schedule Tours:** I have booked tours for my top 3 shortlisted facilities.
- ☐ **Complete Tours:** I have visited my shortlisted facilities and taken notes.

Phase 3: Documentation & Communication

- ☐ **Complete My Preferences Worksheet:** I have filled out my "Residential Aged Care Preferences Template" with my final choices and reasons.
- ☐ **Share My Plan:** I have given a copy of my completed worksheet to my Enduring Guardian, my Attorney, and my close family members.
- ☐ **Store My Documents:** I have stored my worksheet in a safe place with my Will and other important planning documents.
- ☐ **Inform My Executor:** I have told my Executor where to find all my planning documents.

Notes: *(Use this space for any additional notes, questions for your advisor, or contact details.)*

Disclaimer: This checklist is for informational purposes only and does not constitute professional advice. We do not guarantee the accuracy or reliability of its information or calculations.

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