



Document List for Proven Financial Solutions

Because we want to help you in the most efficient way, there are some documents we require if you want to proceed with Proven Financial Solutions. We understand it may take some time to collect these documents....and that's ok! The good news? We only require what is relevant to your situation.

We accept scanned copies via email or photos of documents, please ensure the entire document can be viewed and is clear to read.

Documents can be sent to Richard Meaden via:

Email: rm@provenfs.com.au

Text message: 0426 055 619

We can also copy your documents at our office: Suite 1A, 990 Toorak Rd Camberwell VIC 3124

Personal

Name, date of birth, marital status.

Details of all dependants.

Health report from a doctor

Names and contact details for other advisers (accountant and lawyer).

Assets

Statements covering the date of entry into aged care for ALL:

- Bank accounts
- Superannuation / defined benefits. Please call the fund to request a 'Centrelink Schedule'
- Shares
- Managed funds

House / land details. If you were previously residing in a retirement village, please contact the village to request an 'exit letter'



House contents – value estimate.

Collectables

Business interests.

Family Trust(s) – name, trustees, appointor, copy of trust deed, copy of most recent accounts.

For vehicles, boats, caravans etc, we require to know the date of acquisition, make / model, the price paid, the current value and the owner

Liabilities – eg: loans, lump sum payments

Initial amount, current outstanding, type, purpose term, lender, rate of interest (fixed/variable), payment frequency and amount.

Receipt for any lump sum residential care fees and a bank statement that shows the transfer.

Centrelink, DVA, Aged Care

Most recent Centrelink/DVA Statement

ACAS (aged care assessment service) Assessment

Estate Planning

Power of Attorney

Will

Letter of incapacity (letter from a doctor if a person can no longer make decisions for themselves)

Please note:

- Standard processing times for Centrelink is 6-7 weeks for the original application.
- Proven will need to notify Centrelink when there is a change to your circumstances eg: home is sold, shares sold, lump sum payment is made to a residential care facility etc so just let us know. In such instances we would require settlement documentation, an updated bank statement and any relevant receipts.