



Course: Excellence in Retirement Living and Aged Care Advice



Prepared by: Aged Care Gurus

Workshop: Granny Flats and Home Care

Duration: 1 day + assessment

Workshop Overview | 2025





Contents

Workshop Specific information

1. Contact Details.....	1
2. Course Details	1
3. Intended Learning Outcomes (ILOs)	2
4. Granny Flats and Home Care Workshop: Overview.....	2
5. Workshop Learning Objectives (WLOs)	3
6. Teaching and Learning Strategies	4
7. Required Texts and Materials	4
8. Minimum Requirements.....	4
9. CPD Hours.....	4

Disclaimer

The information contained in this workshop, including reference materials is based on the understanding Aged Care Gurus Pty Ltd has of the relevant Australian laws, regulations, current rates and thresholds at the time the workshop is held. These laws, regulations, rates and thresholds are subject to periodic changes and should be reviewed regularly to ensure that the information provided is still up to date and relevant. While all care has been taken in the preparation of the workshop and reference materials (using sources believed to be reliable and accurate) no person, including Aged Care Gurus Pty Ltd accepts responsibility for any loss suffered by any person arising from reliance on this information.

The workshop and materials are intended as an aid for financial advisers, lawyers and accountants, it does not constitute personal financial product advice or financial advice as defined in the *Corporations Act*. Any examples are used for illustrative purposes only and actual risks and benefits will vary depending on an individual's needs, objectives and financial situation. You should form your own opinion and take your own legal, taxation and financial advice on the application of this information to your business and your clients.



Workshop Specific information

1. Contact Details

Facilitator: Jemma Briscoe B.Bus, CPA, MappFin

Phone: 1300 855 770

Email: jemma@agedcaregurus.com.au

2. Course Details

Excellence in Retirement Living and Aged Care Advice

The Excellence in Retirement Living and Aged Care Advice Course is designed to provide advisers with the skills, knowledge and tools to deliver a quality holistic advice service to senior Australian's and their families. The subjects chosen for this course adopt an interdisciplinary approach to respond to the complex and growing alternatives available to seniors.

This course provides attendees with specialised knowledge and skills to understand the spectrum of accommodation and care options available to senior Australians. The innovative subjects are taught by Jemma Briscoe, who is a sessional staff member at the University of Technology Sydney and Macquarie University, her background is in banking, research and Chartered Accounting.

The 4-day masterclass examines all the relevant aspects of the retirement living and aged care industries for financial planners, accountants and lawyers. Attendees will gain a comprehensive understanding of the various legislative frameworks, contracts and personal legal considerations, together with the financial arrangements of provider fees and charges; pensions and government entitlements, financial planning strategies and means testing arrangements.

Attendees will acquire the necessary skills to critically analyse, develop and deliver advice with a clear understanding of the legal and financial considerations coupled with the ability to access and afford care.

The 4-day masterclass consists of the following elements:

1. **Residential Aged Care Workshop (2-day workshop + assessment)**
2. Granny Flats & Home Care Workshop (1-day workshop + assessment)
3. Retirement Communities Workshop (1-day workshop + assessment)



3. **Intended Learning Outcomes (ILOs)**

- **CAPABILITY:** Understand and analyse relevant strategies within a financial advisory framework and the sector.
- **PROFESSIONAL CONDUCT:** Locate and evaluate relevant client information to determine the best solution for the client.
- **CRITICAL THINKING:** Apply critical thinking, technical and professional skills necessary to operate effectively in financial planning and related professions.
- **REFLECTIVE PRACTICE SKILLS:** Convey information and provide guidance clearly and fluently to clients.
- **INTERDEPENDENCE:** Promote ethical, social responsibility and best practice solutions for clients.

4. **Granny Flats and Home Care Workshop: Overview**

Granny Flats

The idea of family looking after family is not a new story, it has been happening for generations. But what can seem like a simple solution — parents living safely with children close by if help is needed, involves a range of legal and financial issues, and specialist advice is required.

This workshop examines the forms of granny flat arrangements, legal consequences of this arrangement, financial impact to the client including eligibility for pension entitlements, cost of care, rent assistance and other benefits. It also investigates the various strategies available to financial advisers for their clients to consider.

Home Care

Many people think of aged care as a service provided in an aged care facility but in fact most people access some form of support in their own home. Currently there are around 1 million people in Australia who receive aged care services and around 80% receive that care in their own homes. This workshop will examine, discuss and analyse the different forms of care services available to people outside residential aged care. It provides a thorough understanding of the fee structures and charges applicable to the various programs. This is a case based, interactive and informative workshop for people wanting to understand the financial impacts to individuals accessing home care support.



5. Workshop Learning Objectives (WLOs)

Upon successful completion participants should be able to:

Granny Flats

- Explain the different forms of granny flat arrangements.
- Identify potential legal consequences arising from different arrangements.
- Assess, calculate and critically analyse the impact on the client's eligibility for pension entitlement, rent assistance and other government benefits when considering a granny flat arrangement.
- Calculate, examine and discuss the advantages and disadvantages for the various outcomes associated with different strategies identified.
- Deliver a valuable advice service to people considering establishing a granny flat arrangement.

Home Care

- Explain the different forms of care services available outside residential aged care.
- Assess, calculate and critically analyse the impact on the client's eligibility for pension entitlement and eligibility criteria for home care services.
- Understand and calculate the fees and charges applicable to:
 - Commonwealth Home Support Programme
 - Home Care Packages
 - Private care
 - Respite care services
 - Transitional care services
- Deliver a valuable advice service to people considering a home care.



6. Teaching and Learning Strategies

The workshop will consist of the following components:

- **Workshop:** Workshop facilitator delivery of content online, with class discussion and case studies

The material will be delivered through traditional academic teaching methods, lectures, discussions and case studies via Microsoft Teams. A workshop booklet with all the necessary technical material will be provided to the adviser.

- **Closed book assessment:** Post course assessment. This is a closed book, individual assessment. To be completed immediately after the workshop or within 5 days of the workshop.

7. Required Texts and Materials

Course Materials

- Workshop tech guide and case studies
- Workshop slides and workbook

8. Minimum Requirements

Participants must achieve a minimum of 80% in the final assessment to pass this workshop.

9. CPD Hours

This workshop has been accredited CPD 11.25 hrs by Financial Advice Association of Australia (FAAA).

