Course: Excellence in Retirement Living and Aged Care Advice

Prepared by: Aged Care Gurus

Workshop: Residential Aged Care

Duration: 2 days + assessment

Workshop Overview | 2025

Aged Care Gurus

Contents

Workshop Specific information

1. Contact Details

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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. Residential Aged Care Workshop: Overview

As people get older, it can become necessary to move into a residential aged care facility. These provide communal accommodation with varying degrees of care. The Commonwealth Government subsidises a range of aged care services, including residential aged care facilities. The "Living Longer, Living Better" aged care reforms introduced significant changes to residential aged care which apply to people entering aged care from 1 July 2014. This workshop provides a detailed analysis of the costs associated with entering into an aged care facility, the key drivers and stakeholders in this complex industry.

Participants will develop a thorough understanding of the industry. At the conclusion of the workshop participants will be able to evaluate and calculate the asset and income assessment process, discuss and develop strategies to ensure valuable financial advice is provided. This workshop is both theory and practical and includes both pre and post 1 July 2025 residents. The participants will develop a thorough understanding of residential aged care through case-based facilitator lead examples, individual calculations and group discussions.

5. Workshop Learning Objectives (WLOs)

Upon successful completion participants should be able to:

- Identify and discuss the key drivers of the Aged Care industry from an individuals, government, and providers prospective.
- Identify and evaluate the different accommodation choices for residents.
- Assess, calculate and critically analyse the impact on the client's eligibility for pension entitlement and other government benefits when considering a residential aged care facility.
- Develop a thorough understanding of residential aged care fees and charges.
- Evaluate and consider the legal, financial, assess and affordability of a variety of residential care options.
- Create an effective financial planning strategy to assist with funding residential aged care.

- Calculate, examine and evaluate the advantages and disadvantages for the various outcomes associated with different strategies identified.
- Deliver a valuable advice service to people considering residential aged 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 16.5 hrs by Financial Advice Association of Australia (FAAA).

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