Course: Excellence in Retirement Living and Aged Care Advice

Prepared by: Aged Care Gurus

Workshop: Retirement Communities

Duration: 1 day + assessment

Workshop Overview | 2025

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Workshop Specific information

1. ## Contact Details

Facilitator: Jemma Briscoe B.Bus, CPA, MappFin
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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. Retirement Communities Workshop: Overview

Retirement communities, just like the people who live there, come in all different shapes and sizes and offer a range of different lifestyles — for the fit and active retiree to those who are seeking an alternative to residential aged care, and everything in between.

This workshop examines the varying rules and regulations of retirement communities, the legal considerations and the financial impacts including pension entitlements and rent assistance as well as the cost and ability to access care now and in the future. Upon completion of this workshop attendees will be able to identify, calculate and communicate the fees and charges applicable to moving to, living in and leaving a retirement community, understand the rights and responsibilities of different arrangements and deliver valuable advice.

5. Workshop Learning Objectives (WLOs)

Upon successful completion participants should be able to:

- Identify and explain similarities and differences between a retirement village and land lease communities, including the ownership and structure of the arrangement.
- Understand the varying rules and regulations in this industry.
- Explain, calculate and communicate the fees and charges applicable to moving to, living in, and leaving a retirement village or land lease community.
- Determine homeowner status, pension assessment and eligibility for rent assistance.
- Calculate pension entitlement and rent assistance for varying case studies.
- Examine and discuss alternative financial arrangements:
    - Affordable Housing
    - Offsetting the Exit Fee
    - Equity Release

- Discuss and analyse the financial and legal issues including tax.
- Deliver a valuable advice service to people considering a retirement village and/or a land lease community.

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 5.75 hrs by Financial Advice Association of Australia (FAAA).

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