

You want the best
aged care for your
loved one.

That's our goal too.



AGED CARE
FINANCIAL PLANNING



McEwen
Investment
Services

McEwen Investment Services gives you practical help to navigate the aged care system. Our services include:

- ▶ Explaining the different fee options for aged care services
- ▶ Preparing a detailed analysis of your spouse or parent's financial position
- ▶ Providing a strategy that outlines the best options for your family member
- ▶ Determining the best way to structure your finances to maximise entitlements
- ▶ Assistance with Centrelink paperwork
- ▶ Arranging Powers of Attorney
- ▶ Explaining estate planning issues

"I needed help to understand the best way to fund my wife's move into aged care. Rob clearly and simply explained how each funding option works. The cash flow forecasts helped me to decide upon the best way to pay for accommodation and care. I now have peace of mind knowing what we can afford and how we will pay for it."

Ken Robertson, Wahroonga



Clarity when you need it most...

Making the best choice about aged care for your spouse or parent can be overwhelming

You need information that is tailored for their situation, to put you in control with clarity and confidence.

That's where we come in. McEwen Investment Services provides personalised, family-focused advice that can help relieve the pressure and uncertainty of the aged care system.

Financial planning for aged care is about more than money. It's about lifestyle, family and finding a place that can feel like home. It's about ensuring your loved one gets the daily help they need so they can continue to live in the comfort to which they are accustomed.

Call us on 1300 623 936



Knowledge is power

Some of the questions you might be asking yourself are:

- Where do I start?
- What can my parent or spouse afford?
- Will we have to sell their house?
- How much will it cost to secure the type of accommodation and care we want?

Money plays a significant role in finding an aged care solution because it is your loved one's financial position that will determine the care choices available to them.

Seeking independent, practical advice from an experienced aged care financial advisor is essential. We will equip you with the facts

or visit mcinvest.com.au

for your situation, help you understand the possibilities and guide you through the process. The more informed you are, the more control you have about the choices ahead.

A financial roadmap

Every individual's circumstances are different. Our approach is bespoke, with advice that is customised for your family member. We help you understand your spouse or parent's current financial position and then create an aged care roadmap to guide you – so there are no financial surprises. We can offer you certainty and direction to demystify the aged care maze.

Moving your parent or spouse into aged care can be immensely time consuming. There are so many organisational, legal and financial details to arrange. Seeking specialist advice can reduce the strain and give you more time to take care of things at home, where you're needed most.



Expert help that puts your family first

Your focus is on doing what is best for your parent or partner. That's our goal too.

We've been in your shoes, having helped family members transition from independent living to an aged care service. It's an emotional time. You may feel like you carry an overwhelming weight of responsibility to make the best decisions.

Choose McEwen Investment Services and you will receive expert, independent advice that puts your family first. Our down-to-earth approach gives you direct access to your advisor at any time, to ask all the questions you need to ensure your peace of mind.

Established for over 20 years, we have a long history of successfully guiding locals on Sydney's north shore in financial matters. We are accredited aged care financial planners, renowned for long-term relationships that put our client's best interests at heart.

**Call us on 1300 623 936 to talk
about your aged care options
and begin the conversation**



4/53 Grandview Street, Pymble
rob@mcinvest.com.au
mcinvest.com.au
AFSL No. 235915

