



# Accredited Aged Care Professional™ program

## Registration form – Sydney workshop 2024

Build your knowledge and skills for aged care advice. Aged Care Steps (ACS) is the leading business providing support aged care advice, with highly experienced facilitators who have had practical experience in aged care advice. Complete the program to become an **Accredited Aged Care Professional™** (see conditions below).

### What does the program involve?

The program involves three components to qualify for the Aged Care Steps (ACS) Accredited Aged Care Professional™:

1. Five pre-reading Essentials Modules – covering the basic knowledge required, across aged care accommodation options, home care, residential care and Centrelink assessments. Each module takes 1 -1.5 hours to complete. Assessment is via an online 20 multiple-choice question quiz.
2. Face-to-face workshop – a two-day interactive workshop aimed at building a deeper knowledge base and application of advice processes and strategies to enable attendees to build the skills and confidence to provide aged care advice by following a 9-step advice framework.
3. Final assessment – a case-study based assignment and a multiple-choice assessment testing application of knowledge and skills developed in the workshop. Each component is worth 50% of overall result and an overall pass mark of 70% is required. Attendees have two months after the workshop to complete (with access to our Toolkit calculators to help).

The program is supported with a workshop folder including slides and handouts for ongoing use when providing advice, fact sheets, additional short videos, as well as a **special offer of two-months FREE access** to calculators in our Aged Care Business Toolkit™.

Attendees will also be registered in our optional 10-week follow up email program to reinforce learning. An accreditation logo and certificate will be provided upon successful completion for use with marketing and promotional activities.

### Who should attend?

This program is designed for financial planners, paraplanners, accountants and lawyers who wish to provide financial planning advice for clients accessing aged care services. But it also provides a deeper understanding of aged care for professionals working in other related fields. The Accreditation can only be awarded to attendees authorised under an Australian Financial Services Licence (AFSL).

## What content is covered?

During the workshop you will learn:

- The **Aged Care Steps' 9-step framework** to guide you through a logical process for how to interact with clients and develop advice solutions
- The rules for calculating aged care fees (residential and home care)
- Understanding how the former home is assessed
- Strategies for funding aged care needs with consideration for cashflow and estate maximisation
- An understanding of the challenges faced by the aged care services sector
- Practical tips for navigating Centrelink & means-test assessments
- Case studies and strategies covering singles, couples, low-means, high-net wealth and financial hardship
- Alternatives to residential care, including the financial implications of retirement villages and land lease communities
- Navigating the home care system
- Compliance and best practice tips when advice is provided to an Enduring Power of Attorney
- Practical tips for how to kickstart your aged care advice business, including pricing, compliance, service offer and how to start client discussions.

## Industry recognition

### Financial Advice Association Australia

For FAAA members, the Aged Care Steps (ACS) Accreditation program is the education pathway required to apply for the **FAAA Aged Care Specialist** designation. Further details at: <https://faaa.au/financial-planning-education/faaa-specialist-designations/>

### RPL for Masters of Financial Planning

A partnership with Deakin University enables advisers enrolled in their Master of Financial Planning (MFP) to have the Aged Care Steps (ACS) Accredited Aged Care Professional™ program recognised as one credit point elective subject (conditions apply).

Deakin also offers Aged Care Steps clients a 15% discount on the MFP course fees with our discount code (proof of eligibility required). Further details at: <https://www.deakin.edu.au/course/master-financial-planning>.

### Industry awards

Aged Care Steps is an **award-winning education provider**, as winner of the IFA Excellence award for Training and Education Provider of the Year in 2022 & 2020, as well as a finalist in 2021 & 2023.



**IFA Excellence Awards**  
IFA Excellence Award – Company **Winner** 2020  
Training and Education Provider of the Year **Winner** 2020  
Training and Education Provider of the Year **Winner** 2022

## CPD hours

The Accreditation workshop program has been accredited for continuing professional development hours by the Financial Advice Association Australia. The total of 30 approved CPD hours are expected to be:

### Essentials pre-reading modules (8 hours CPD):

Legislated CPD areas	ASIC knowledge requirements
Technical competence (8 hours)	Aged care (6 hours) Financial planning (2 hours)

### Two-day workshop (13.5 hours CPD):

Legislated CPD areas	ASIC knowledge requirements
Technical competence (6 hours) Client care and practice (5 hours) Ethics and Professionalism (1.5 hours) Regulatory compliance and consumer protection (0.5 hour) Tax (financial) advice (0.5 hour)	Aged Care (4.75 hours) Financial planning (2.5 hours) Skill requirements (5.75 hours) Estate planning (0.5 hour)

### Assessment component (8.5 hours CPD):

Legislated CPD areas	ASIC knowledge requirements
Technical competence (4.0 hours) Client care and practice (3.0 hours) Ethics and Professionalism (0.75 hour) Regulatory compliance and consumer protection (0.75 hour)	Aged Care (4.0 hours) Financial planning (1.5 hours) Skill requirements (3.0 hours)



**AGED  
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STEPS**

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## Registration details - Sydney

Complete this registration form and return these two pages to [training@agedcaresteps.com.au](mailto:training@agedcaresteps.com.au).

### Attendee details

Name:		
Email:		
Company name and ABN:		
AFSL name (if applicable):		
Address (postal):		
City/suburb:	Postcode:	State:
FAR number:	Phone	
Dietary requirements:		
How did you hear about this course?		

### Session details

Please register me for the following workshop program. Prices per attendee:

Dates:	Time:	Price:
April - Thur 11th & Fri 12th	Sold out	
July - Wed 3rd & Thur 4th	9.00am - 5.00pm	\$2,300+GST
Sept - Wed 25th & Thur 26th	9.00am - 5.00pm	\$2,300+GST

**Venue: Holiday Inn, Victoria Road Potts Point, NSW 2000 (subject to change).**

An invoice will be issued for payment by bank transfer or credit card. Payment is required before attendance at the workshop.

## Registration for Calculators in the Aged Care Business Toolkit <sup>TM</sup>

As a special offer, registrants of the Accredited Aged Care Professional program are offered a FREE 2-month access to calculators contained in the Business Toolkit .

Access to the calculators is through limited access to the BusinessToolkit, provided online via authorised log-in for the person registering for this workshop. Log-in details will be sent to your email address and log-in is taken as acceptance of our Standard Terms & Conditions (a copy will be provided with the log-in details).

Free access is provided for two-months from the end of the workshop component of your registration. The ACS team will contact you before the end of the two months to discuss continued access through full paid membership packages. As all services are provided under a license arrangement, if you choose not to continue your membership your log-in will be cancelled.

Please sign below to accept this offer

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Name:

Position:

Date

### **Cancellation policy**

Any variations to your registration are to be requested in writing to [training@agedcaresteps.com.au](mailto:training@agedcaresteps.com.au). Cancellations made more than 5 business days before the workshop will be eligible for a full refund (less any booking fees or catering charged by external payment services). Cancellations within 5 business days are not eligible for a refund but you may send a substitute in your place. Transfers to a future date can be requested but a \$80 (+GST) transfer fee may apply within 5 business days of the workshop date.

### **Disclaimer**

Aged Care Steps (ACS) Pty Ltd will make every effort to ensure that the event and the program will take place as advised. ACS reserves the right to cancel or amend the workshop and will not take financial responsibility resulting from any changes, including travel and/or accommodation.

### **Privacy information**

Aged Care Steps (ACS) is committed to handling your personal information in accordance with the Privacy Act. If you do not provide the information requested, we may be unable to process your registration. ACS will not share this information with external parties but may use it for marketing in relation to our services unless you tick the following box: