Aged care advice process

Fact find



Client engagement tools:

- Client conversation guide
- Client questionnaire

the material and tools

Process guide on how and when to use

- Discussion/strategy paper
- SoA
- Templates (paraplanning)
- Strategy development
- Technical knowledge

Advice implementation

Follow up support:

- On-going care
- Client communication
- Other advice opportunities (e.g. other family members, inheritance)
- Referrals

Attract clients

Training – initial and on-going practical training

Business

ready

- Processes mapping key decisions and steps in the advice process
- Value proposition Tools to position and explain the client value proposition
- Pricing Training to position the pricing of the service
- Tools support to develop the business structure

Advice delivery

Support to attract existing and new clients and market to facilities

Support tools:

- Flyers
- Advertisements
- Letters to existing clients
- Presentation packs clients
- Presentation packs facilities

On-going support

- Product range and research
- Process map of steps and procedures