

This forum is suitable for those who are retired or considering retirement, aged 60 years or above, or Aboriginal or Torres Strait Islander people aged 50 years or above.

This is a **FREE EVENT**, bookings are essential.

Book online or call us:

[manningham.vic.gov.au/financial-matters](https://manningham.vic.gov.au/financial-matters)

9840 9700

### Useful links

#### My Aged Care

[myagedcare.gov.au](https://myagedcare.gov.au)

1800 200 422

#### Services Australia Financial Information Services

[servicesaustralia.gov.au/financial-information-service](https://servicesaustralia.gov.au/financial-information-service)

1800 227 475

#### Carer Gateway

[carergateway.gov.au](https://carergateway.gov.au)

1800 422 737

#### OPAN - Older Persons Advocacy Network

[opan.org.au](https://opan.org.au)

1800 700 600

#### Seniors Rights Victoria

[seniorsrights.org.au](https://seniorsrights.org.au)

1300 368 821

This program is presented in partnership with:



# Manningham Forum Financial Matters

*How to get the most out of your money in retirement*

## FREE EVENT

Wednesday 28 June 2023

9.30am to 2.30pm

Manningham Function Centre  
669 Doncaster Road, Doncaster



The Financial Matters Forum is designed to help you prepare and get the most out of your money in retirement. We have guest speakers from *Services Australia Financial Information Services* and *Eastern Community Legal Centre* who will provide information and advice on:

- maximising your income
- downsizing your home
- financial assistance through the Commonwealth Government
- the financial and legal impacts of gifting

This event will be opened by Deputy Mayor Cr Tomas Lightbody and Master of Ceremonies, Keri Kennealy, Manager Aged and Disability Support Services.

## Overview of the day

9.30am	Arrival, registration and refreshments	Function room 1
9.50am	Welcome and official opening	Function room 1
10.00am	Eastern Community Legal Centre and Elder Abuse Response Team	Function room 1
10.20am	Services Australia - Financial Information Services	Function room 1
10.30am	<b>Morning tea</b>	Function room 1
11.00am	Concurrent sessions A and B	See session description
12.00pm	<b>Lunch and speak with the experts</b>	Function room 2
12.45pm	Concurrent sessions C and D	See session description
2.00pm	Wrap up and close	Function room 1

## Session A: Options in retirement

**Speaker: Financial Information Service Officer**  
**11.00am, Function room 1**

The Financial Information Service helps you make informed decisions about your finances. This session will cover topics to assist you to make independent decisions relating to your own finances. Topics include:

- understanding your finances and options
- options for retirement
- planning and preparing for your retirement
- how to make information financial decisions
- taking control of your finances to increase lifestyle choices.

## Session B: Working with an Aged Care Specialist Officer

**Speaker: Aged Care Specialist Officer**  
**11.00am, Function room 3**

What is an Aged Care Specialist Officer? They are part of My Aged Care face-to-face services and can help you with your aged care matters. They can support you by:

- providing in-depth information on the different types of aged care services available to you
- checking you're eligible for government-funded services and making a referral for an aged care assessment
- helping you to understand the costs associated with residential care
- assisting you to appoint a representative for My Aged Care.

## Session C: The home

**Speaker: Aged Care Specialist Officer**  
**12.45pm, Function room 1**

Home Equity Access Loans – find out how you and your partner may be able to use this scheme to supplement your retirement income if you have real estate assets. This scheme lets older Australians get a voluntary non-taxable loan from us.

Gifting - if you give away your income or assets, they may still count towards your income and assets tests. This also applies if you sell them for less than they're worth. Understand how gifting impacts your finances.

Downsizing – learn how downsizing your home or granny flat impacts you.

## Session D: Aged Pension

**Speaker: Financial Information Service Officer**  
**12.45pm, Function room 3**

This session will help you increase your confidence with financial matters including:

- investment, salary sacrifice and superannuation
- assets / income streams
- general Aged Pension – open discussion question and answers
- notification requirements and rights when on an income support payment.