Financial Advocacy Checklist

[Your Care/Nursing Home Name]

Completed as part of the initial assessment

The purpose of this questionnaire is: (i) to demonstrate affordability, (ii) to help you consider the financial issues involved in care and (iii) to help you determine if it is advisable to see a specialist care fees adviser. This conforms to the Best Practice & Advocacy recommendations outlined in the Care Standards Act 2000, National Minimum Standards 14.3.

Potential Resident Name				DOB:	
Contact/Attorney's Name					
Contact/Attorney's Address					
				Postcode	
Daytime Number		Eve		Mobile	
Email					

Checklist

Please answer these questions as fully and accurately as possible.

		Yes	No	Unsure	N/A
1	Has a Social Services assessment of needs and costs been undertaken?				
2	What are the expected care fees and personal expenses per week?	£			
3	Is the Local Authority contributing towards or paying for *care*? (ignore other benefits received)				
4	Is the potential resident married or in a civil partnership?				
5	What is the total amount of income available per week (not including savings or investments)?	£			
6	Does this include Pension Credit?				
7	Is a domestic home owned?				
8	If yes, what is its approximate value?	£			
9	If yes, is it or will it be for sale?				
10	If yes, is there a spouse, child under 16, incapacitated relative, or relative over 60 living there? (if yes, please circle the applicable person)				
11	Has the 12 week disregard been applied?				
12	What is the approximate value of savings and investments? (inc house proceeds if sold)	£			
13	Have you arranged *secure* funding for the care fees?				
14	If yes, does this include the ability to pay likely future increases?				
15	Have you seen a *specialist* independent care fees adviser?				
16	Is the individual of sound mind?				
17	Is there a Power of Attorney? [ ] No [ ] Power of Attorney [ ] Enduring Power of Attorney				
18	[ ] Lasting Power of Attorney (Property) [ ] Lasting Power of Attorney (welfare)				
19	If yes, is it registered?				

Notes/Other information you think may be useful:

Mike Migan of CareFeesAdvisers (contact details below), is our preferred specialist adviser, unless you have your own specialist care fees adviser, and will contact you to discuss any issues raised on this questionnaire unless you expressly ask him not to by ticking this box [ ]. CareFeesAdvisers is a division of Retirement Planning Associates Limited, who are Authorised and Regulated by the Financial Services Authority, No 403829.

Signed		Name	
Date		Capacity	

Distribution

Original to: Care Home Files

Copy to: CareFeesAdvisers, 397 Hale End Road, Woodford Green, Essex, IG8 9LL, Fax: 0845 2802362, Tel: 0800 043 4036.

Copy to: Applicant/Attorneys