

Media Release

Mentor launches aged care specialist adviser designation

Need for aged care & disability advice solutions has never been greater – demand set to increase

Monday April 16, 2018. 4.2 million Australians are disabled and of these, 1.4 million are severely disabled and all require guidance to navigate often overwhelming and confusing scenarios and solutions. They are often housed in Aged & Residential Care facilities, and knowledge about creating optimal solutions for them is a vital part of the model. This situation is about to escalate with Australians aged over 65 expected to treble over coming three decades.

With the growth of Australia’s ageing and disabled population, the financial advice sector needs more advisers than ever with the capacity to provide comfort and reassurance through advice, care and investment solutions at those critical times when important decisions need to be made said Greg Roberts of Aged Care Specialists.



Commenting further Greg Roberts said with nearly 3.6 million people in Australia currently aged over 65, professional advice practitioners need to include aged care advice as part of a holistic offering that reflects the journey for their clients from wealth accumulation to retirement, or possible unforeseen disability.

“Senior Australians and individuals with disability all have one thing in common, the need for personalised advice as each situation is unique and requires a tailored outcome for their needs”, added Greg Roberts.

For seniors needing aged care and individuals with disability, the financial complexities and scenarios can literally be overwhelming with the need to consider income requirement, tax situation, nest egg protection and growth of overall wealth, risk management, estate planning, fee minimisation and, also, consideration around Centrelink situations etc.

When considering residential scenarios for example, the options range from staying in the current home, downsizing, to renting, to granny flats, to caravan parks and demountable homes, to living with families, to supported living, independent living and residential care. They all require personalised advice and support.

To assist advice practitioners, Aged Care Specialists with input from retirement and property specialists, lawyers, accountants, trustees and planners developed an advice, care and investment solution for advice practitioners.

“The role of the adviser is pivotal for providing peace of mind, trust, compliant advice and ongoing involvement to ensure objectives are achieved”.

Last year Mentor Education (Mentor) launched a training solution for financial planners, accountants and lawyers with the addition of the Aged and Disability Care Specialist Advisor



The offer has been well received by industry with students undertaking the study in the first intake of January 2018 confirmed Mentor Education founder and director Dr Mark Sinclair.

Student intake for 2018 reflects the industry’s response to this growing need said Dr Sinclair.

On successful completion of their studies, graduates will be designated as Aged & Disability Care Specialist Adviser™ and can offer long-term advice and investment solutions as part of their ongoing client services.

Both Aged Care Solutions and Mentor are adamant that Aged & Disabled advice solutions is a market opportunity in its own right and for those advisers that undertake study and accreditation, will be positioned us as market leaders.

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Issued jointly by Aged Care Specialists www.agedcarespecialists.com.au

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