

Please complete the following sections | Y=Yes N=No ?=Don't know

Are you the person needing care? Y N

If no, do you have the legal authority to act on behalf of the person in care? Y N

If no, please ask the person needing care to arrange as soon as possible.

If they are unable to give instruction you'll need to contact the Office of the Public Guardian (or regional equivalent).

Where is the person needing care now:

In hospital In a care home Still at home Somewhere else

If care hasn't been decided on yet, do you need any help sourcing the most appropriate care? Y N

Have you considered care at home? Y N

Or, have you located your preferred care home? Y N

Has the person in care got savings above the upper means test threshold? Y N ?

If no, we'd suggest contacting your nearest Adult Social Care department.

If Local authority funding is already being paid, does it cover the full costs of care? Y N ?

If no, would you benefit from advice about how to fund the third party top up? Y N ?

Does the person own a property? Y N ?

What is the estimated value?

Is the property likely to be excluded from the means test? Y N ?

If no, could the universal deferment agreement be of benefit? Y N ?

Have you or the person needing care met with a specialised financial adviser? Y N ?

If yes, have you or the person in care explored all the funding options available? Y N ?

If yes, do you have fully underwritten quotes for an immediate care annuity? Y N ?

Does the person in care have any form of long term care insurance? Y N ?

Has Attendance Allowance been claimed? Y N ?

Has Funded Nursing Care been awarded? Y N ?

Has anyone discussed the eligibility for NHS Continuing Healthcare? Y N ?

Does the person in care have a current and/or valid will? Y N ?

Has the person in care already arranged and/or paid for their funeral? Y N ?

Your next steps

- **Print off this form**
- **Complete as much as possible**
- **Contact your chosen Symponia member**
 - If you have a handbook their details should be on the outside back page
 - If not, simply use the "find a member" section on the website
- **Arrange to send or hand-deliver this form to them**

Your details

Name: _____

Telephone (landline/mobile): _____

Email: _____