

Financial Knowledge Centre Story Wealth Management

In this month's newsletter, we begin by discussing the Government's Work Bonus scheme, and the benefits associated with it, for those of us who continue (or recommence) working during our retirement years. Our animation illustrates the Commonwealth Home Support Programme, an entry-level aged care program, aimed at helping us to continue to live independently in our home for as long as possible. Life events – such as COVID-19 – can disrupt context cues and create opportunities to make decisions and implement new intentions and goals; we touch on financial needs and wants in a post-COVID-19 world. Passing away intestate has the potential to cause undue emotional and financial distress for the loved ones that are left behind; we provide an overview of the intestacy rules in Australia. We also share a clever video by Volvo as a segue to give an update on several proposed measures from the 2019-20 Federal Budget – these relate to providing more flexibility for older Australians to contribute to super.

Working during retirement and the Work Bonus scheme

When looking at long-term data, the workforce participation rate of those aged 65 and over has steadily risen over the years. In this article, we discuss working during retirement and the Work Bonus.



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Aged care: Commonwealth Home Support Programme

From a care needs perspective, it's vital to consider the retirement chapters we will move through, and plan accordingly. In this animation, we illustrate the Commonwealth Home Support Programme.



Launch Video

Financial needs and wants in a post-COVID-19 world

Life events can disrupt context cues and create opportunities to make decisions and implement new intentions and goals. In this article, we discuss financial needs and wants in a post-COVID world.



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Invalid wills, passing away intestate, and intestacy rules

One of the most important things we can do prior to our passing is to ensure we have a valid will in place. In this article, we provide an overview of various intestacy rules that exist in Australia.



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Update: Improving flexibility of super for older Australians

In the 2019 Budget, the Government announced their intention to provide more flexibility for older Australians to contribute to super. Accompanied by a clever Volvo video, we give an update on this.



Launch Video

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