

# Seeking advisors



When it's time to dive into the details of your retirement living contract, having trusted advisors by your side is key. Whether you already have a team or are starting from scratch, this worksheet will help you create a shortlist of experts you can rely on. Once you're ready to sit down with them, here's a list of guiding questions to get you started.

You may already have a trusted team of experts on hand to assist you. If not, start by turning to family and friends for referrals, which will help you to form a shortlist. Make a note of those you wish to contact:

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Once you've secured your trusted team of advisors and are ready to sit down with them, here's a list of guiding questions to get you started.

## Fees and charges

- How is the management fee calculated?
- Do you have a payment option that doesn't involve a management fee?
- What are the ongoing fees or charges and how often are they charged?
- Are there any big upcoming capital works which will result in an increase in fees and charges?

## The moving in process

- What if there is a delay in selling my home?
- What is the cooling-off period?
- Do I need to have a Power of Attorney in place?

Keep track of your trusted advisors and their advice with this worksheet, ensuring you have the right support as you navigate your retirement journey.



For more tips and resources, continue exploring the Retirement Living Guide.



[aveo.com.au/retirement-living-guide](https://aveo.com.au/retirement-living-guide)