

Financial Worksheet

COMPARE WHERE YOU LIVE NOW

| CURRENT EXPENSES | \$ PER MONTH |
|--|-----------------|
| Rent/Principle & Interest | \$ _____ |
| Home/Renter's Insurance | \$ _____ |
| Home Owner's Association Dues | \$ _____ |
| Property Taxes | \$ _____ |
| Water/Sewer | \$ _____ |
| Trash Collection | \$ _____ |
| Gas/Electric | \$ _____ |
| Cable TV | \$ _____ |
| Wifi | \$ _____ |
| Telephone | \$ _____ |
| City Assessments | \$ _____ |
| Interior Home Maintenance | \$ _____ |
| Exterior Home Maitenance | \$ _____ |
| Lawncare | \$ _____ |
| Snow Removal | \$ _____ |
| Transportation | \$ _____ |
| Food Costs | \$ _____ |
| Entertainment/Recreation | \$ _____ |
| 24-Hour Monitoring | \$ _____ |
| Security Service/Alarm System | \$ _____ |
| Cleaning and Laundry Costs | \$ _____ |
| Fitness Center Membership | \$ _____ |
| Club memberships | \$ _____ |
| Healthcare Costs | \$ _____ |
| Your Current Total Monthly Cost | \$ _____ |

| OUR SENIOR LIVING | \$ PER MONTH |
|------------------------------|-----------------|
| Monthly Rental Fee | \$ _____ |
| Renter's Insurance | \$ _____ |
| Property Taxes | Included |
| Water/Sewer | Included |
| Trash Collection | Included |
| Gas/Electric | Included |
| Cable TV | \$ _____ |
| Telephone | \$ _____ |
| Wifi | \$ _____ |
| Interior Home Maintenance | Included |
| Exterior Home Maitenance | Included |
| Snow Removal | Included |
| Lawncare | Included |
| Scheduled Transportation | \$ _____ |
| Restaurant-Style Dining | \$ _____ |
| Entertainment/Recreation | Included |
| 24-Hour Emergency Response | \$ _____ |
| Housekeeping/Laundry Service | \$ _____ |
| Fitness Center | \$ _____ |
| Personal Service Plan | \$ _____ |
| Other | \$ _____ |
| Total Monthly Cost | \$ _____ |