

Cost Comparison Worksheet

What are you or your family member actually paying right now in monthly expenses? How does this compare to the cost of a retirement community? Complete this worksheet and take it with you when you visit a retirement community. Find out what services the community includes in the monthly rent.

<u>Monthly Expense</u>	<u>Your Current Monthly Costs</u>	<u>Cost of Services Provided by Community</u>
Mortgage or Rent	\$ _____	\$ _____
Property Tax	\$ _____	\$ _____
Property Insurance	\$ _____	\$ _____
Heating & Air Conditioning	\$ _____	\$ _____
Electric	\$ _____	\$ _____
Water & Sewer	\$ _____	\$ _____
Telephone	\$ _____	\$ _____
Television/Cable	\$ _____	\$ _____
Trash Removal	\$ _____	\$ _____
Yard Care & Snow Removal	\$ _____	\$ _____
Home Repair/Maintenance	\$ _____	\$ _____
Housekeeping Services	\$ _____	\$ _____
Laundry	\$ _____	\$ _____
Auto or Other Transportation Expenses	\$ _____	\$ _____
Groceries	\$ _____	\$ _____
Dining/Entertainment	\$ _____	\$ _____
Recreation/Fitness Services	\$ _____	\$ _____
Nursing/Homecare	\$ _____	\$ _____
Total Monthly Expenses	\$ _____	\$ _____

Income/Assets Worksheet

Use this form to calculate income and assets. This will help you determine what you can afford.

Monthly Income Sources

Social Security \$ _____

Pension \$ _____

Interest/Dividends \$ _____

Other \$ _____

Total Monthly Income \$ _____

Assets

Home or Other Property \$ _____

Stocks/Bonds/Mutual Funds \$ _____

Savings Accounts/CD's \$ _____

IRA/401K \$ _____

Other \$ _____

Total Assets \$ _____