

Expense Comparison Worksheet

Cost is a key consideration when thinking about moving into a senior living community. You may be surprised to learn that many older people spend more money living alone and paying expenses separately, than they would by joining a senior living community. This worksheet will help families compare current living expenses with that of a senior living lifestyle.

Current Monthly Expenses	Your Present Home	The Stilley House
1 Mortgage, Rent or The Stilley House Fees	\$ <input style="width: 100%;" type="text"/>	\$ <input style="width: 100%;" type="text"/>
2 Utilities (Electricity, Gas, Water, Sewer, Trash Removal)	\$ <input style="width: 100%;" type="text"/>	Included
3 Property Tax and Insurance	\$ <input style="width: 100%;" type="text"/>	Included
4 Home or Renter's Insurance	\$ <input style="width: 100%;" type="text"/>	\$ <input style="width: 100%;" type="text"/>
5 Yard Care & Landscape Maintenance	\$ <input style="width: 100%;" type="text"/>	Included
6 Weekly Housekeeping	\$ <input style="width: 100%;" type="text"/>	Included
7 Maintenance & Home Repairs	\$ <input style="width: 100%;" type="text"/>	Included
8 24-Hour Security	\$ <input style="width: 100%;" type="text"/>	Included
9 Laundry Services (Washer & Dryer)	\$ <input style="width: 100%;" type="text"/>	Included
10 Transportation (Insurance, Gas, Registration, Repairs)	\$ <input style="width: 100%;" type="text"/>	Included
11 Three Meals Daily	\$ <input style="width: 100%;" type="text"/>	Included
12 Social, Cultural, Recreational Events	\$ <input style="width: 100%;" type="text"/>	Included
13 Health and Wellness	\$ <input style="width: 100%;" type="text"/>	Included
24-Hour Emergency Call Service	\$ <input style="width: 100%;" type="text"/>	Included
Exercise Programs	\$ <input style="width: 100%;" type="text"/>	Included
Full-time Activities Staff	\$ <input style="width: 100%;" type="text"/>	Included
14 Subtotal	\$ <input style="width: 100%;" type="text"/>	\$ <input style="width: 100%;" type="text"/>
Potential Income from Sale of Home		
15 Net Proceeds from Sale of Home*	\$ <input style="width: 100%;" type="text"/>	Included
16 Invest at Current Market Rate, e.g. (line 15 X 6%)	\$ <input style="width: 100%;" type="text"/>	Included
17 Monthly Investment Income from Home Sale (line 16 divided by 12)	\$ <input style="width: 100%;" type="text"/>	Included
18 Total Current Monthly Expenses Plus Potential Income from Sale of Home (line 14 + line 17) vs. The Stilley House Fees	\$ <input style="width: 100%;" type="text"/>	\$ <input style="width: 100%;" type="text"/>

* It may be helpful to consult a tax and financial adviser to determine this amount which represents the market value of your home less any outstanding mortgage, all sales related costs and any applicable taxes.

