

MONTHLY EXPENSE WORKSHEET

IMPORTANT: When completing this worksheet we understand that some expenses are paid annually. Please take the annual cost, divide by 12, and input this number. You need to know your "average cost per month" expense number. (IF there are TWO SENIORS add total expense together here in this column.)

If there are services wanted that you are not receiving now, add in a fair cost estimate.

Monthly Food Costs - associated w/ providing 3 meals a day, beverages, & snacks		
Monthly Mortgage, Line of Credit and/or Current Rental Payments		
Property Taxes		
Homeowners / Renters Insurance		
Electric Bill		
Gas Bill		
Water / Sewer Bill		
Trash and Recycling		
Landscaping / Outside Maintenance		
Own a Pool? Costs for opening, closing, maintenance		
Snow Removal		
Major Repairs or Replacements? Roof, HVAC, Appliances, Tree Removal? (A \$7000 cost would equate to \$583 /Mo. A \$1200 cost could add another \$100 / Mo.) What's your number?		
Cable TV, WIFI and Home Phone		
Monthly cost for Weekly Housekeeping		\$300.00
Monthly cost for Weekly Bed Linen Changes & Towel Laundered Services		\$200.00
Medication Management		\$250.00
EMERGENCY CALL SYSTEMS		\$50.00
Transportation to Dr. Appts., Dentists, Podiatrists, PT, Beauty Salon or other healthcare visits		\$150.00
Social & Recreational Activities-Going to Lunch or to see a Movie		\$150.00
Other Social Activities, such as Happy Hours, Day Trips		\$150.00
Having someone available 24/7? (\$25/hour could cost \$16,800++) Calculate your number / Mo.		
OTHER monthly expenses associated with home?		
TOTAL MONTHLY EXPENSES	\$	



We Care Senior Solutions

O: 610-970-4200

C: 610-310-6623

The Placement Agency that advocates for you and your family

PLEASE NOTE:

Numbers inputted in the column to the left are conservative guesstimates, based on average cost per service. If you are not receiving these services but want or need them, please feel free to adjust the number based on average cost of services in your area.



INCOME & ASSETS WORKSHEET



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<u>CURRENT INCOME</u>	SENIOR ONE	SENIOR TWO
Social Security		
Monthly Pensions		
Does your Pension have a balance and is it accessible?		
Interest, Investment or Stock Income		
Other Income		
CAN FAMILY OR FRIENDS HELP SUPPLEMENT your monthly income? If so, how much / Mo.		
<i>Senior ONE Income</i>	\$	
<i>Senior TWO Income</i>		\$
TOTAL INCOME	\$	

<u>CURRENT ASSETS</u>	SENIOR ONE	SENIOR TWO
Savings		
Checking		
401k's or IRA's		
Life Insurance Cash Value		
Are you expecting any Inheritance or Insurance Settlements?		
VALUE of Real Estate		
Value of OTHER ASSETS, equipment, vehicles, valuables that will be liquidated before or during your downsizing or transition into Senior Living?		
<i>Senior ONE Assets</i>	\$	
<i>Senior TWO Assets</i>		\$
TOTAL ASSETS	\$	

Please visit our website to schedule a call!

We will help you determine the best fit for your family based on YOUR location wants, care needs if any, and financial abilities.

Not only will we negotiate on your behalf, there is no cost to you.



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