



EXPENSE COMPARISON SHEET

Staying Put vs. Senior Living

Complete this financial worksheet to compare your current cost of living
to the lifestyle at one of our communities.

MONTHLY EXPENSES LIVING	CURRENT SITUATION	COMMUNITY
Mortgage or rental payment	\$ _____	\$ _____
Property tax and insurance	\$ _____	Included
Utilities		
Electricity, gas, water, sewer, trash removal	\$ _____	Included
HOA fee if applicable	\$ _____	Included
Yard care and landscape maintenance	\$ _____	Included
Maintenance and home repairs	\$ _____	Included
• Exterior re-paint	\$ _____	
• Replacement of HVAC	\$ _____	
• Roof replacement	\$ _____	
• Window replacement	\$ _____	
• Carpet replacement	\$ _____	
Appliances replacement & repair	\$ _____	Included
Weekly housekeeping and personal linen service	\$ _____	Included
24-hour alert call system and on-site security	\$ _____	Included
Transportation	\$ _____	Included
<i>Insurance, gasoline, registration, repairs</i>		
Dining out once per day	\$ _____	Included
Wellness & continuing ed. programs: <i>Social, cultural, recreational events</i>	\$ _____	Included
Health monitoring programs	\$ _____	Included
<i>Gym membership</i>	\$ _____	Included
Full-time activities staff	\$ _____	Included
Total	\$ _____	\$ _____