Financial Worksheet

MONTHLY EXPENSES	CURRENT	TYPICAL INDEPENDENT LIVING
Rent/Mortgage	$	$
Cellphone	$	$
Insurance	$	$
Subscriptions	$	$
Groceries/Eating Out	$	$
Property Taxes	$	$
Activities/Entertainment	$	$
Landline/Internet	$	$
Cable	$	$
Dining	$	Included
HOME MAINTENANCE		
Homeowners Association Fees	$	Included
Housekeeping	$	Included
Landscaping	$	Included
Snow Removal	$	Included
Homeowner's Insurance	$	Included
Safety Feature Updates	$	Included
UTILITIES/OTHER		
Electric	$	Included
Gas	$	Included
Water/Sewer	$	Included
Trash	$	Included
Fitness Membership	$	Included
Transportation	$	Included
TOTAL COST	$	$

The cost of independent living may seem high at first, but many of your monthly expenses are already included in your rent. In fact, many residents find they pay the same—or even less—than they did while living at home. This worksheet can help you compare your current monthly costs with the all-inclusive pricing of most retirement communities. Simply total your existing expenses and see how they compare. For a more personalized comparison, we encourage you to connect with a member of our team for a full financial walkthrough.

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