

## MONTHLY COST COMPARISON WORKSHEET

When individuals consider moving from their present home into a retirement community, an important concern is the comparable cost between their present situation and retirement living. This worksheet is to assist you with a monthly budgetary assessment of your current living environment and retirement living.

|                                   | <u>My Home</u> | <u>Hearthstone</u> |
|-----------------------------------|----------------|--------------------|
| <b>HOUSING</b>                    |                |                    |
| • Rent/Mortgage                   | _____          | _____              |
| • Homeowner's Insurance           | _____          | <i>included</i>    |
| • Electricity                     | _____          | <i>included</i>    |
| • Gas                             | _____          | <i>included</i>    |
| • Sewer/Water                     | _____          | <i>included</i>    |
| • Garbage Pickup                  | _____          | <i>included</i>    |
| • Phone                           | _____          | <i>included</i>    |
| • Cable TV                        | _____          | <i>included</i>    |
| • High-speed Internet             | _____          | \$ 20              |
| • Repairs                         | _____          | <i>included</i>    |
| • Property Taxes                  | _____          | <i>included</i>    |
| • Lawn Care                       | _____          | <i>included</i>    |
| • Security System                 | _____          | <i>included</i>    |
| <b>FOOD</b>                       |                |                    |
| • Groceries                       | _____          | _____              |
| • Eating Out                      | _____          | _____              |
| <b>MISC. SUNDRY ITEMS</b>         |                |                    |
| _____                             | _____          | _____              |
| <b>TRANSPORTATION</b>             |                |                    |
| • Auto                            | _____          | <i>unnecessary</i> |
| • Insurance                       | _____          | <i>unnecessary</i> |
| • License: auto & driver          | _____          | <i>unnecessary</i> |
| • Gasoline & Oil (change)         | _____          | <i>unnecessary</i> |
| • Repairs                         | _____          | <i>unnecessary</i> |
| • Taxis, public transportation    | _____          | _____              |
| <b>TRAVEL &amp; ENTERTAINMENT</b> |                |                    |
| • House and/or pet sitter         | _____          | <i>included</i>    |
| • Club Memberships, etc.          | _____          | <i>included</i>    |
| <b>MEDICAL</b>                    |                |                    |
| • Doctor                          | _____          | _____              |
| • Prescriptions                   | _____          | _____              |
| • In-home Care                    | _____          | _____              |
| • Emergency Call System           | _____          | <i>included</i>    |

(over)