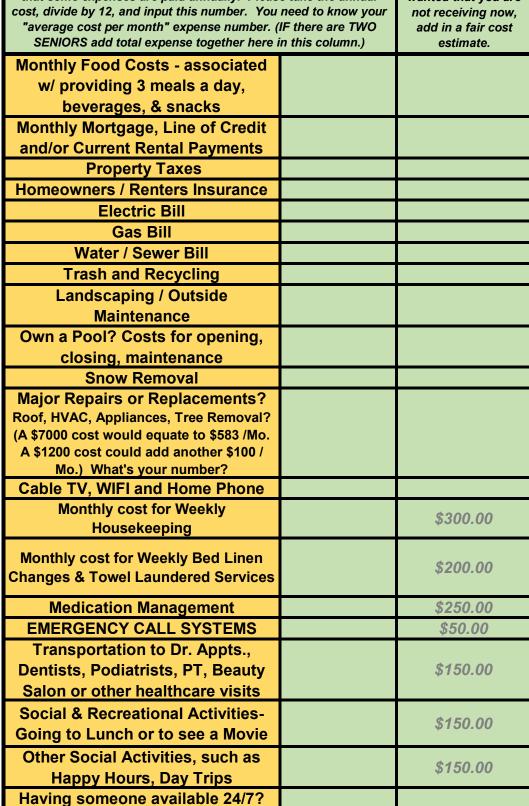
## MONTHLY EXPENSE WORKSHEET

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.



(\$25/hour could cost \$16,800++) Calculate your number / Mo. **OTHER monthly expenses** associated with home? TOTAL MONTHLY EXPENSES



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## PLEASE NOTE:

Numbers inputted in the column to the left are conservative quesstimates, 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.



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## **INCOME & ASSETS WORKSHEET**

CURRENT INCOME	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.		
Senior ONE Income	\$	
Senior TWO Income		\$
TOTAL INCOME	\$	



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CURRENT ASSETS	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?		
Senior ONE Assets	\$	
Senior TWO Assets		\$
TOTAL ASSETS	\$	

www.WeCareSeniorSolutions.com info@WeCareSeniorSolutions.com

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.



(WCSS-DLEWS-P2-921)