

Assisted Living Expense Worksheet

This worksheet will help you compare the costs of your current living situation to those of a Dogwood Forest™ Assisted Living Community. While many people consider home care and adult day services to be less expensive options to assisted living, they are often surprised to see how adding care costs to current monthly home and living expenses can actually make Dogwood Forest™ Assisted Living the more affordable option.

Monthly Expense Description	Current Expenses	Dogwood Forest™ Expenses
Monthly Home Mortgage or Monthly Rent	\$	\$
Caregiver Fees	\$	\$
Transportation (auto insurance, taxes, fuel & maintenance)	\$	Included
Real Estate Costs (home owners/renters insurance, taxes, etc.)	\$	Included
Utilities: Electricity Power	\$	Included
Utilities: Gas	\$	Included
Utilities: Water	\$	Included
Utilities: Trash	\$	Included
Lawn Care	\$	Included
Maintenance and Repairs (HVAC, appliances, upkeep, etc.)	\$	Included
Groceries (meals, snacks and beverages)	\$	Included
Wellness Checks	\$	Included
Housekeeping & Linen Service	\$	Included
Laundry Services	\$	Included
Wellness, Lifestyle & Exercise Programs	\$	Included
Socialization & Entertainment	\$	Included

Making assisted living even more affordable by considering your financial options:

- Veterans Aid and Attendance Pension
- Real Estate
- Elderlife Financial Services
- Life and Viatical Settlement Services
- Savings, CDs, Social Security, Investments, Pensions & Retirement
- Tax Deductibility Opportunity
- Companion Apartments

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