

# COST OF LIVING WORK SHEET



Once you have established your current cost of living we ask you to compare those costs against the numerous services and amenities offered in our all inclusive one month fee. We are certain that the carefree retirement lifestyle at our communities along with the availability of professional assisted living care is an exceptional investment in your peace of mind and quality of life.

We have developed a simple cost comparison worksheet to understand the value offered by Autumnwood Mature Lifestyle Communities.

1

## CURRENT ANNUAL INCOME

Government Pension	\$	
Other Pension	\$	
Dividends	\$	
Interest	\$	
Annuities	\$	
Trust Income	\$	
Other Income	\$	
<b>GROSS INCOME</b>	<b>\$</b>	<b>(A)</b>

2

## EQUITY INCOME FROM SALE OF PROPERTY

Sale Price of Home	\$	
Outstanding Mortgage (if applicable)	(minus) -	
Real Estate Commissions	(minus) -	
Other Selling Expenses (including moving costs)	(minus) -	
<b>NET PROCEEDS OF SALE</b>		
Annual investment Income		
from Net Proceeds of Sale	\$	<b>(B)</b>
<b>Revised Gross Annual Income</b>	<b>\$</b>	<b>(A+B)</b>
Annual Income Tax	(minus) -	
<b>TOTAL AVAILABLE ANNUAL NET INCOME</b>	<b>\$</b>	
<b>MONTHLY INCOME (÷ 12)</b>	<b>\$</b>	<b>(C)</b>

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**YOUR CURRENT HOME MONTHLY EXPENSES**

Rent or Mortgage Payment	\$
Internet	\$
Telephone	\$
Cable TV	\$
Groceries, Dining Out	\$
Travel	\$
Entertainment	\$
Electricity	\$
Gas	\$
Air Conditioner	\$
Water	\$
Sewer	\$
Garbage removal	\$
<b>SUBTOTAL:</b>	<b>\$</b>

**RETIREMENT RESIDENCE MONTHLY EXPENSES**

Rent	\$	
Internet *	\$	
Telephone *	\$	
Cable TV *	\$	
Daily Meals and snacks		included
Travel to some outside activities		included
Entertainment		included
Electricity		included
Gas		included
Air conditioning		included
Water		included
Sewer		included
Garbage removal		included
<b>SUBTOTAL:</b>	<b>\$</b>	

**MAINTENANCE**

Housekeeping	\$
Lawn Care	\$
Painting and repairs	\$
Major appliances and repairs	\$
Homeowners Insurance	\$
Taxes	\$
<b>SUBTOTAL:</b>	<b>\$</b>

**MAINTENANCE**

Housekeeping		included
Lawn Care		included
Painting and repairs		included
Major appliances and repairs		included
Homeowners Insurance		included
Taxes		included
<b>SUBTOTAL:</b>	<b>\$</b>	

**PERSONAL CARE & WELLNESS**

Security/Alarm	\$
Toiletries, laundry, cleaning supplies	\$
Fitness programs	\$
Home care attendant	\$
Dietary consultant	\$
Flat linen service/Dry cleaning	\$
24 hour monitoring system	\$
<b>SUBTOTAL:</b>	<b>\$</b>
<b>TOTAL</b>	<b>\$</b>

**PERSONAL CARE & WELLNESS**

Security/Alarm		included
Toiletries, laundry, cleaning supplies		included
Fitness programs		included
Resident nurse on staff		included
Dietary consultant		included
Flat linen service		included
24 hr monitoring system		included
<b>SUBTOTAL:</b>	<b>\$</b>	
<b>TOTAL</b>	<b>\$</b>	

Monthly Investment Income (line C): n/a (minus) - \$

**FINAL TOTAL MONTHLY COST \$ \$**

\* Note: cable, internet and telephone offered at a competitive price