

Financial Worksheet



We've developed our Financial Worksheet to help you identify your current monthly living expenses and those that will be covered by Normandy Park Senior Living monthly rental fees. You'll find that living at Normandy Park is more affordable than you thought.

| Your Expenses | | |
|---|-----------|-------------------------|
| Monthly Expenses | AT HOME | AT NORMANDY PARK |
| Monthly rent or Mortgage | | |
| Second-person Fee | | |
| Homeowner's/Renter's Insurance | | |
| Homeowner's Association Fees | | NA |
| Property Tax | | NA |
| Security System | | INCLUDED |
| Electricity/Gas/AC | | INCLUDED |
| Telephone | | |
| Basic Cable TV | | |
| High-Speed Internet (DSL or cable) | | |
| Public computer with internet access and e-mail | | INCLUDED |
| Water/Garbage | | INCLUDED |
| Housekeeping Service | | INCLUDED |
| Lawn & Garden Service | | INCLUDED |
| Maintenance/Repairs | | INCLUDED |
| Food – including dining out ⁽¹⁾ | | INCLUDED ⁽¹⁾ |
| Entertainment/Movies | | INCLUDED |
| Shopping/Medical Transportation | | INCLUDED |
| Health Club Dues | | INCLUDED |
| Health Insurance | | |
| Long-term Care Insurance | | |
| Medical Alert System | | |
| Federal Income Tax Deduction ⁽²⁾ | - () | - () ⁽²⁾ |
| TOTAL | \$ | \$ |

1 Includes three meals

2 The IRS recognizes a portion of the Assisted Living Service Fee as a medical expense deduction. The Service Fee is for care needs based on an assessment and established prices per care point. Consult your tax advisor for more information.

