

# The Rockwood Senior Living Financial Worksheet

APARTMENT DESIRED	FLOOR PLAN	
	SQUARE FOOTAGE	
	Discount Specials	
	MARKET RATE	
	SECOND PERSON FEE	\$500
	Total Monthly Rent	

Total Expenses Living at Home	
Total Expenses Living at The Rockwood	
DIFFERENCE (Home minus The Rockwood)	

HOUSING	Home Expenses	The Rockwood	Difference
Mortgage or rent		\$	
Phone (Negotiated with Phone Co.)			
Electricity/ Gas		Included	
Water and sewer		Included	
Waste removal		Included	
Lawn/ Gardening/ Snow Removal		Included	
Pest Control		Included	
Maintenance or repairs		Included	
Housekeeping every other week		Included	
24/7 Security		Included	
H.O.A. / Subdivision Fees		Included	
<b>Total</b>			

ENTERTAINMENT	Home Expenses	The Rockwood	Difference
Cable - Charter Expanded Basic		Included	
Wifi - Data Stream		Included	
Wifi - Movie Streaming		Negotiable	
Inhouse Concerts		Included	
Outside Concerts		Discounted	
Live theater		Discounted	
Weekly Social Outings		Discounted	
Fitness Center		Included	
Personal Trainers		Included	
Conceirge Services		Included	
<b>Total</b>			

TRANSPORTATION	Home Expenses	The Rockwood	Difference
Transportation Services		Included	
Bus/taxi fare			
Insurance			
Licensing			
Fuel			
Maintenance			
Vehicle Payment			
<b>Total</b>			

LOANS	Home Expenses	The Rockwood	Difference
Personal			
Student			
Credit card			
Credit card			
Credit card			
Other			
<b>Total</b>			

INSURANCE	Home Expenses	The Rockwood	Difference
Home	H.O. - \$	Renters - \$	
Health			
Life			
Medical (Lifeline) Alert System		Included	
<b>Total</b>			

TAXES	Home Expenses	The Rockwood	Difference
Federal Income Tax			
State Income Tax			
Real Estate Tax		Included	
Personal Property Tax		Included	
<b>Total</b>			

FOOD	Home Expenses	The Rockwood	Difference
Groceries			
Dining out			
Breakfast/ Dinner Daily		Included	
<b>Total</b>			

SAVINGS OR INVESTMENTS	Projected Cost	Actual Cost	Difference
Retirement account			
Investment account			
Other			
<b>Total</b>			

PETS	Home Expenses	The Rockwood	Difference
Food			
Medical			
Grooming			
Toys			
Deposit Per Pet		\$500 per pet	
<b>Total</b>			

GIFTS AND DONATIONS	Projected Cost	Actual Cost	Difference
Charity 1			
Charity 2			
Charity 3			
<b>Total</b>			

PERSONAL CARE	Projected Cost	Actual Cost	Difference
Medical			
Hair/nails			
Clothing			
Dry cleaning			
Laundry Facility		Included	
Organization dues or fees			
Other			
<b>Total</b>			

LEGAL	Projected Cost	Actual Cost	Difference
Attorney			
Alimony			
Payments on lien or judgment			
Other			
<b>Total</b>			

BURDEN FREE LIVING	PRICELESS
PEACE OF MIND	PRICELESS
NEW FRIENDS AND SOCIALIZATION	PRICELESS