

Monthly Cost Impact of Moving to a Retirement Community

Use this worksheet to compare the monthly cost of living at home to the monthly cost of living in a retirement community.

	Monthly Cost Today (at home)	Will this expense be included in your monthly fee at the retirement community?		Monthly Cost at Retirement Community (If not included in MSF)
		Yes	No	
MONTHLY SERVICE FEE (MSF)	\$ N/A	N/A	N/A	\$
MORTGAGE/RENT	\$	Yes	No	\$
HOA DUES	\$	Yes	No	\$
SECURITY SYSTEM	\$	Yes	No	\$
WATER	\$	Yes	No	\$
GAS	\$	Yes	No	\$
ELECTRICITY	\$	Yes	No	\$
PHONE	\$	Yes	No	\$
CABLE	\$	Yes	No	\$
INTERNET	\$	Yes	No	\$
HOMEOWNERS INSURANCE	\$	Yes	No	\$
TRASH REMOVAL	\$	Yes	No	\$
PROPERTY TAX	\$	Yes	No	\$
LAWN SERVICE	\$	Yes	No	\$
SNOW REMOVAL	\$	Yes	No	\$
HOME REPAIRS (AVG.)	\$	Yes	No	\$
GYM MEMBERSHIP	\$	Yes	No	\$
GROCERIES	\$	Yes	No	\$
HOUSEKEEPING	\$	Yes	No	\$
ALL OTHER	\$	Yes	No	\$
TOTAL	\$			\$

The cost of assisted living or healthcare services would be in addition to the expenses listed above. This is true of staying in the home or living in a retirement community. As it relates to continuing care retirement communities (CCRCs or “life plan communities”), the cost of such care services may be an additional monthly expense or may be included in your monthly fee. Refer to the contact for details.