



Financial Evaluation Worksheet

| Expenses | |
|--|----|
| Mortgage or Rent | \$ |
| Association Fees | \$ |
| Property Taxes | \$ |
| Home Insurance | \$ |
| Gas/Oil/Wood heat | \$ |
| Electricity | \$ |
| Water | \$ |
| Housekeeping | \$ |
| Laundry service | \$ |
| Snow Removal | \$ |
| Lawn/Yard Service | \$ |
| Home Maintenance & Repairs | \$ |
| Food/Dining | \$ |
| Transportation (gas, maintenance, insurance, etc.) | \$ |
| Social & Education Programs | \$ |
| Recreation & Entertainment | \$ |
| Home care | \$ |
| Other | \$ |
| | |
| Total Expenses | \$ |

| Income | |
|--------------------------|----|
| Social Security | \$ |
| Pension/Retirement | \$ |
| Income from Work | \$ |
| Annuities | \$ |
| Other | \$ |
| | |
| Total Income | \$ |
| | |
| Assets | |
| Home Value | \$ |
| Bank Accounts | \$ |
| CD's, Savings Bonds | \$ |
| Stocks, Bonds, etc. | \$ |
| Retirement Accounts | \$ |
| | |
| Trusts | \$ |
| | |
| Total Assets | \$ |
| | |
| Other | |
| Long Term Care Insurance | \$ |