



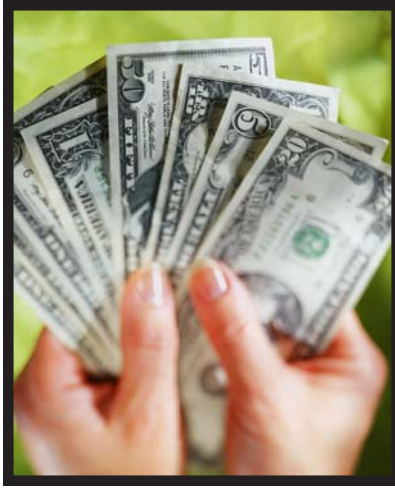
Moving to Country Cottage may be more affordable than you think. This financial tool is designed to identify the monthly expenses that will be included or reduced by making the Cottage your home.

When you choose to move to the Cottage, you gain a variety of benefits, both tangible and intangible. With supportive services and a rich social life, our residents are living longer, staying healthier, and feeling happier than their friends who remain at home. And with the security of the Cottage, they - and their children - have fewer worries and more confidence about whatever the future may bring.

## Step 1: Monthly Expenses

	SAMPLE EXPENSES		YOUR EXPENSES	
	TYPICAL MONTHLY EXPENSES	COUNTRY COTTAGE'S MONTHLY FEE & EXPENSES	CURRENT MONTHLY EXPENSES	COUNTRY COTTAGE'S MONTHLY FEE & EXPENSES
<b>MONTHLY SERVICE FEE</b>	N/A	\$ 2,075	N/A	\$
Rent or Mortgage	\$ 0	N/A	\$	N/A
Homeowner's/ Renter's Insurance	100	35		
Property Tax	40	N/A		N/A
Electricity/ Gas/ AC	200	INCLUDED		INCLUDED
Telephone	30	30		
Basic Cable TV	35	38		
Water/ Garbage/ Sewer	75	INCLUDED		INCLUDED
Housekeeping Service	150	INCLUDED		INCLUDED
Lawn & Garden Service	100	INCLUDED		INCLUDED
Maintenance/ Repairs	200	INCLUDED		INCLUDED
Food - including meals out	500	5		
Entertainment/ Movies	50	INCLUDED		INCLUDED
Shopping/ Medical Transportation	50	INCLUDED		INCLUDED
Health Insurance	500	500		
Medical Alert System	40	INCLUDED		INCLUDED
Federal Income Tax Deduction*	N/A	(75)		
<b>ADDITIONAL EXPENSES</b>				
Car Loan/ Lease	300	0		
Car Gas/ Repairs	40	0		
Auto Insurance/ License	80	0		
Gifts/ Donations/ Tithes	50	50		
Sitter Expense (2 hrs/ day)	900	0		
Medical Expenses NOT covered by insurance (doctors, dentists, eyecare, hospitals, prescriptions)	30	30		
Personal Care including clothing, beauty shop, etc. / Savings/ Investments	30	30		
<b>TOTAL</b>	<b>\$ 3,500</b>	<b>\$ 2,718</b>	<b>\$</b>	<b>\$</b>

\* Federal tax law allows for a deduction for a portion of Assisted Living expenses. Ask for more info!



## **Step 2: Monthly Income**

Total Current Monthly Income	\$ _____
PLUS Monthly Benefits from Long-Term Care Insurance, VA Assistance	\$ _____
Total Amount Available for Assisted Living	\$ _____

## **Step 3: Assets to be Converted to Income**

*Many people choose to sell a house, car or other assets.*

Converted Asset #1: _____	\$ _____
Converted Asset #2: _____	+ _____
Converted Asset #3: _____	+ _____
Converted Asset #4: _____	+ _____
REVISED Amount Available for Assisted Living	\$ _____

For More Information,  
Call Lisa Terry Today!



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