

# "AT HOME"

## MONTHLY FINANCIAL WORKSHEET

Bridge Senior Living's educational tool to help families estimate potential monthly expenses that may be associated with aging at home.

### 1. Gather Your Monthly Costs

MONTHLY EXPENSE	COST
Mortgage/Rent	\$
Property Taxes	\$
Homeowners Insurance	\$
Home Association Fees	\$
Utilities	\$
Trash/Recycling Removal	\$
Groceries	\$
Phone Service	\$
Internet Service	\$
Cable TV Service	\$
Total	\$

MONTHLY EXPENSE	COST
Housekeeping	\$
Home Security System	\$
Smart Home Technology	\$
Personal Alert System	\$
Transportation	\$
Lawn Care/ Snow Removal	\$
Dining Out	\$
Meal Delivery	\$
Home Health Care	\$
Other	\$
Total	\$

### 2. Anticipate Your Future Home Costs

- Have you experienced rising home maintenance costs over the past 2-3 years, or do you anticipate any large-scale home maintenance costs in the next 2-3 years (roof, plumbing, electrical)?
- Have property taxes, insurance, or utility bills risen recently?
- Do you anticipate that you will need any home modifications as you age at home?
- Are you paying more or do you expect to pay more for convenience services (meal delivery, transportation, grocery delivery) over the next 2-3 years?

### 3. Determine "Peace of Mind" Costs

- Do you have an emergency evacuation plan if severe weather or power loss occurs?
- Do you have a plan for overnight support or supervision if needed?
- Who would assist with transportation or relocation if you could not stay at home?
- Could added safety needs increase monthly expenses? If your health needs change tomorrow, would you need additional paid caregiving support?
- What other costs would increase if mobility or memory support became an issue?

Want to explore planning options? Contact us to schedule a conversation or tour.