



# FINANCIAL *Worksheet*

Amount Needed to Meet Needs: \$ \_\_\_\_\_

Monthly Annual Increase: \$ \_\_\_\_\_

## Current Monthly Expenses

Mortgage/Rent	\$ _____	Water	\$ _____
Home Insurance	\$ _____	Transportation	\$ _____
Taxes	\$ _____	Care Expenses	\$ _____
Utilities	\$ _____	Cable	\$ _____
Phone	\$ _____	Other	\$ _____
<b>Total Monthly Expenses</b>			\$ _____

## Current Monthly Income

	Amount	Projected End Date
Pension	\$ _____	_____
Social Security	\$ _____	_____
Investment Income	\$ _____	_____
Rental Income	\$ _____	_____
Other	\$ _____	_____
Family Contributions (if any)	\$ _____	_____
Total Mo. Income	\$ _____	
Total Mo. Expenses	\$ _____	
Current Net Difference	\$ _____	
Total Community Fees Mo.	\$ _____	
Future Net Difference	\$ _____	

Which option appeals most so far?

Our Community       Staying Put

### Assets

Value of Home	\$ _____	Investment Properties	\$ _____
Savings	\$ _____	LTC Policy	\$ _____
Investments	\$ _____	Other	\$ _____

## What makes Sundale Senior Living special?

Sundale Senior Living in Huntsville, TX bridges the gap between independent living and standalone assisted living solutions. It's our goal to ensure your loved one lives a healthy, safe, and fulfilling retired life, so we provide a variety of care services that can be customized to them. Any of our services can be combined, removed, or added as necessary. Residents enjoy:

- Various living space options
- Activities and social events
- An on-site beauty salon
- Proximity to Huntsville Memorial Hospital
- Weekly housekeeping services
- Nutritious meals and snacks
- Transportation services
- Emergency call pendants
- A 24/7 dedicated staff

If you're interested in learning more about our assisted living community and wish to schedule a tour, get in touch today!

