

Financial Resources Worksheet

Use this worksheet to determine the financial resources available for senior housing options.

Annual Income

Wages	\$ _____
Dividends	\$ _____
Interest	\$ _____
Pension	\$ _____
Rental	\$ _____
Social Security	\$ _____
Other	\$ _____

Savings and Investments

Savings Accounts	\$ _____
Certificates of Deposit	\$ _____
IRA	\$ _____
401(k)	\$ _____
Stocks	\$ _____
Bonds	\$ _____
Valuable Collections	\$ _____
Other	\$ _____

Home

Fair Market Value	\$ _____
(less any mortgage, equity loan & taxes)	\$ _____

Total \$ _____

Insurance

Long-Term Care	\$ _____
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ESTIMATED TOTAL ASSETS \$ _____