

"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.