

Financial Worksheet

While the cost of senior living may seem prohibitive, many of your monthly bills are included in your rent, and quite often residents find that they are paying about the same, or even less, to live with Prestige as they do when living independently.

This worksheet can help you compare your monthly costs. The following elements are included in your monthly rent with Prestige; to compare pricing, tally up your current monthly bills to see how it compares, and talk to the Prestige community nearest you to see how that compares to our monthly rent.

CURRENT MONTHLY EXPENDITURE	
Rent/Mortgage	
Property Taxes	
Utilities	
Groceries	
Cable	
Phone/Internet	
Maintenance/Housekeeping/Landscaping	
TOTAL:	

Financial Documents to Have on Hand

You will want to gather the following financial documents in preparation for a move to Prestige:

DOCUMENT	HAVE	NEED	N/A
Bank/Brokerage Accounts			
Mortgage/Property Deeds			
Pension/Retirement Benefits			
Social Security Payments			
Stock/Bond Certificates			
Tax Returns			
Insurance Policies			
Vehicle Titles			
Outstanding Bills/Debts			
VA Benefits			
Other			



Other Documents to Have on Hand

The following are other documents we recommend having in place prior to your move with Prestige:

DOCUMENT	HAVE	NEED	N/A
Will			
Power of Attorney			
Advance Directives for Care			
Life Insurance Policies			
Medical History/Medications			
Military Records			
Social Security Card			
Driver's License			
Passport			
Online Usernames/Passwords			
Birth Certificate			
Other			

