



SOMMERSET

Expense Comparison Worksheet

Current Monthly Expenses

Your Present Home

Sommerset Retirement

1 Mortgage, Rent or Sommerset Fees	\$ <input type="text"/>	\$ <input type="text"/>
2 Utilities (Electricity, Gas, Water, Sewer, Trash Removal)	\$ <input type="text"/>	Included
3 Property Tax and Insurance	\$ <input type="text"/>	Included
4 Home or Renter's Insurance	\$ <input type="text"/>	\$ <input type="text"/>
5 Yard Care & Landscape Maintenance	\$ <input type="text"/>	Included
6 Weekly Housekeeping	\$ <input type="text"/>	Included
7 Maintenance & Home Repairs	\$ <input type="text"/>	Included
8 24-Hour Security	\$ <input type="text"/>	Included
9 Laundry Services (Washer & Dryer)	\$ <input type="text"/>	Included
10 Transportation (Insurance, Gas, Registration, Repairs)	\$ <input type="text"/>	Included
11 Two Meals Daily	\$ <input type="text"/>	Included
12 Social, Cultural, Recreational Events	\$ <input type="text"/>	Included
13 Health and Wellness	\$ <input type="text"/>	Included
24-Hour Emergency Call Service	\$ <input type="text"/>	Included
Exercise Programs	\$ <input type="text"/>	Included
Full-time Activities Staff	\$ <input type="text"/>	Included
14 Subtotal	\$ <input type="text"/>	\$ <input type="text"/>

Potential Income from Sale of Home

15 Net Proceeds from Sale of Home*	\$ <input type="text"/>	Included
16 Invest at Current Market Rate, e.g. (line 15 X 4%)	\$ <input type="text"/>	Included
17 Monthly Investment Income from Home Sale (line 16 divided by 12)	\$ <input type="text"/>	Included
18 Total Current Monthly Expenses Plus Potential Income from Sale of Home (line 14 + line 17) vs. Sommerset Fees	\$ <input type="text"/>	\$ <input type="text"/>

* It may be helpful to consult tax and financial advisers to determine this amount which represents the market value