

Assisted Living Community – Cost Worksheet

Use this worksheet to estimate your costs.

Community Information

Community Name:

Contact:

E-Mail:

Phone:

Included?

Costs	Included?		Amount	Notes
	Yes	No		
Waiting list deposit			\$	
Move-in fee(s)			\$	
Initial assessment fee			\$	
Preferred unit and basic service package			\$	
Meals			\$	
Housekeeping			\$	
Personal laundry service			\$	
Linen service (bed linens, towels)			\$	
Cable television			\$	
Private phone line			\$	
Utilities (gas, electricity, sewer, water)			\$	
Resident call system with 24-hr. response			\$	
Internet Access			\$	
Medication management/assistance			\$	
Personal care assistance (bathing, dressing, eating, etc.)			\$	
Transportation			\$	
Field trips/Planned outings			\$	
Wellness Program			\$	
Storage			\$	
Other:			\$	
Other:			\$	
Total Estimated Cost per Month:			\$	

Additional Questions	Notes
What are the contract options available?	
What are the entrance fees?	
What are the policies for refunding entrance or waiting list deposit fees?	
What is the pet deposit?	
What services are included in the monthly rate? List:	
What additional fees are charged for care, services and supplies?	
What are the billing, payment and credit policies?	
What is the policy for fee increases?	
Under what conditions can a contract be terminated?	
Is insurance required to cover personal property and possessions?	
What is the policy if a resident is no longer able to pay with private funds and is Medicaid eligible?	
What programs are available to help cover the cost of services such as government, corporate, or private programs? (e.g., Veteran’s Administration, Life Settlement, Bridge loans)	