

PERSONAL FINANCIAL WORKSHEET

Benton House

Current Monthly Income

Social Security	
Total:	

Notes

Savings/Investments *(Savings/CDs/Stocks/Bonds/Other Investments)*

Personal Savings	
Total:	

Notes

Real Estate

Property	Estimated Sale Value	Estimated Rental Income
Primary Home (Sale)		
Total		

Notes

Personal Property/Other Assets

Item	Estimated Sale Value
Total	

Notes

Other Important Questions

1. Do you have a long term care insurance policy?
2. Are you a veteran or the spouse of a veteran?
3. Do you have a life insurance policy?
4. Do you have anyone who can help pay for services (family, etc.)?
5. Do you need a short term line of credit to make this transition?

Notes

All content contained within this page is provided for general information only, and should not be treated as a substitute for advice and information from a personal financial or tax advisor. Individuals should consult with their personal financial or tax advisor for advice about which financial options are best for them.

