

## Continuing Care Retirement Community (CCRC) – Cost Worksheet

Use this handy worksheet to estimate your costs.

### Community Information

Community Name:	Contact:
E-Mail:	Phone:

Costs	Included?		Amount	Notes
	Yes	No		
Waiting list deposit	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Entrance Fees	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Pet deposit	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Preferred housing and basic service package	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Meals	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Housekeeping	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Personal laundry service	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Linen service (bed linens, towels)	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Cable television	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Private phone line	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Utilities (gas, electricity, sewer, water)	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Resident call system with 24-hr. response	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Internet Access	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Medication management/assistance	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Personal care assistance (bathing, dressing, eating, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Transportation	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Field trips/Planned outings	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Wellness Program	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Storage	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Expected fee increases	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	\$	
Other: _____	<input type="checkbox"/>	<input type="checkbox"/>	\$	
<b>Total Estimated Cost per Month:</b>			\$	

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 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?	
What happens if a resident encounters financial difficulty?	
What are the policies for determining a resident’s need to move to another care level?	