PERSONAL FINANCIAL WORKSHEET

Benton House

Current Monthly Income

Social Security	
Total:	

Notes	

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

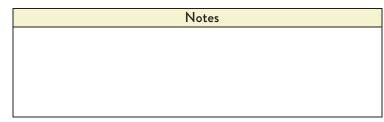
Personal Savings	Notes
Total:	

Real Estate

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

Personal Property/Other Assets

ltem	Estimated Sale Value
Total	



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.

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