

Monthly Expense Breakdown-One Bedroom

John and Mary Smith The Smith's Assets		Sally O'Brian Ms. O'Brian's Assets	
Value of House	190,000	Value of Condo	150,500
IRA	49,000	Certificates of Deposit	45,000
Checking Account	15,000	Checking Account	8,000
Savings Account	60,000	Stocks, Bonds, Mutual Funds	33,900
Stocks, Bonds, Mutual Funds	39,000	Cash Surrender Value of Life Ins.	4,600
Certificates of Deposit	40,000	Savings Account	10,000
Total Assets	393,000	Total Assets	252,000
The Smith's Income		Ms. O'Brian's Income	
Social Security	1,550	Social Security	1,000
Pension	1,325	Pension	975
Interest and Dividends	350	Interest and Dividends	300
Total Income	3,225	Total Income	2,275
The Smith's Expenses After Moving to San Camillo One Bedroom Traditional		Ms. O'Brian's Expenses After Moving to San Camillo One Bedroom Traditional	
100% Refundable Entrance Fee	117,045	100% Refundable Entrance Fee	117,045
Monthly Fee	1,635	Monthly Fee	1,635
Second Person Fee	515	Television/Phone	57
Television/Phone	57	Total Monthly Expenses	1,692
Total Monthly Expenses	2,207		

Monthly Expense Breakdown-Two Bedroom

Ed and Jane Johnson The Johnson's Assets		Joe Brown Mr. Brown's Assets	
Value of Condo	275,000	Value of House	180,000
IRA	49,000	Savings Account	60,000
Checking Account	15,000	Checking Account	8,500
Certificates of Deposit	18,300	Stocks, Bonds, Mutual Funds	54,000
Stocks, Bonds, Mutual Funds	39,200	Cash Surrender Value of Life Ins.	4,600
Total Assets	396,500	Total Assets	307,100
The Johnson's Income		Mr. Brown's Income	
Social Security	1,880	Social Security	988
Pension	1,850	Pension	900
Interest and Dividends	320	Annuity Distributions	1,355
Total Income	4,050	Total Income	3,243
The Johnson's Expenses After Moving to San Camillo Two Bedroom Traditional		Mr. Brown's Expenses After Moving to San Camillo Two Bedroom Traditional	
100% Refundable Entrance Fee	219,000	100% Refundable Entrance Fee	219,000
Monthly Fee	1,934	Monthly Fee	1,934
Second Person Fee	515	Television/Phone	75
Television/Phone	75	Total Monthly Expenses	2,009
Total Monthly Expenses	2,524		

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