

# Financial Considerations Worksheet

Name(s): \_\_\_\_\_

Date: \_\_\_\_\_

As you review the projected fees for Kendal at Lexington, the following worksheet may be helpful in identifying the assets and income available to you as you plan for your move.

**KENDAL**<sup>®</sup>  
*at Lexington*

*Together, transforming the experience of aging<sup>®</sup>*

160 Kendal Drive  
Lexington, Va 24450

1-800-976-8303 • 540-463-1910  
email: info@kalex.kendal.org

**KALEX.Kendal.org**

## YOUR RESOURCES:

### Assets

Equity in your primary residence \_\_\_\_\_

Other real estate equity \_\_\_\_\_

Value of Qualified Investments \_\_\_\_\_  
*(IRA, Roth IRA, 403(b) or 401(k))*

Equities (Stocks, Bonds) \_\_\_\_\_

Savings/Checking \_\_\_\_\_

Life Insurance Death Benefit \_\_\_\_\_

Other Assets \_\_\_\_\_

Long-term care insurance     Yes     No

TOTAL ASSETS \_\_\_\_\_

### Monthly Income

Social Security \_\_\_\_\_

Pension(s) \_\_\_\_\_  
*Survivor percentage*

Annuities \_\_\_\_\_

Mandatory withdrawal from qualified investments \_\_\_\_\_

Dividend Income \_\_\_\_\_

Other Income \_\_\_\_\_

TOTAL MONTHLY INCOME \_\_\_\_\_



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## WHAT WILL IT COST TO LIVE AT KENDAL AT LEXINGTON?

Residents enter into a continuing care agreement (contract) with Kendal at Lexington by paying a one-time entry fee and ongoing monthly fees that cover a residence, services and amenities, and a comprehensive package of health care services including long-term care.

One Time Entrance Fee (choose Lifecare or Modified Contract): \_\_\_\_\_

Monthly Fee: \_\_\_\_\_  
*(includes utilities, housekeeping, meal plan, Lifecare or Modified Lifecare contract)*

Typical Monthly Expenses: \_\_\_\_\_  
*(health insurance, medication, car insurance, gas, travel, food)*

Monthly Debt (other than mortgage): \_\_\_\_\_

Extra Monthly Expenses: \_\_\_\_\_  
*(such as extensive travel, high-end gifts, large charitable contributions, second-home)*

TOTAL MONTHLY EXPENSES: \_\_\_\_\_

NOTES:

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