

# Elder Care Budget Worksheet

To effectively plan and budget, one must keep accurate and up-to-date information on income and expenses. This worksheet will certainly help.

Today’s date \_\_\_\_\_

Elder’s name \_\_\_\_\_

## Income and Assets Inventory

Wages/commissions \_\_\_\_\_

Savings \_\_\_\_\_

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

Stocks/bonds \_\_\_\_\_

IRA/Keough \_\_\_\_\_

Pensions/profit sharing \_\_\_\_\_

Rental income \_\_\_\_\_

Real estate \_\_\_\_\_

Investments \_\_\_\_\_

Other \_\_\_\_\_

## Average Monthly Expenses

Housing \_\_\_\_\_

Home maintenance/repairs \_\_\_\_\_

Taxes \_\_\_\_\_

Insurance \_\_\_\_\_

Food \_\_\_\_\_

Utilities \_\_\_\_\_

Cable TV \_\_\_\_\_

Transportation \_\_\_\_\_

Auto maintenance \_\_\_\_\_

License/sticker fees \_\_\_\_\_

Vehicle insurance \_\_\_\_\_

Medical \_\_\_\_\_

Dental \_\_\_\_\_

Prescriptions \_\_\_\_\_

Long-term-care insurance \_\_\_\_\_

Assisted-living services \_\_\_\_\_

Adult day services \_\_\_\_\_

Eyeglasses/hearing aids \_\_\_\_\_

Personal care \_\_\_\_\_

Clothing \_\_\_\_\_

Laundry/housekeeping \_\_\_\_\_

Entertainment \_\_\_\_\_

Memberships \_\_\_\_\_

Fitness \_\_\_\_\_

Travel \_\_\_\_\_

Gifts \_\_\_\_\_

Donations \_\_\_\_\_

**Total Expenses** \_\_\_\_\_

**Total Income** \_\_\_\_\_

**Subtract Total Expenses** \_\_\_\_\_

**Monthly Balance** \_\_\_\_\_