

# Richfield Living Senior Living Financial Worksheet

## Get Organized

Financial Items	Have	Need	N/A
Bank Account Info			
Brokerage Account Info			
Deeds			
Mortgage Papers			
Insurance Policies			
Monthly Bills			
Stock Certificates			
Bond Certificates			
Social Security Info			
Pension Info			
Other Retirement Benefit Info			

## Apply Your Funds

<b>Your Home</b>	Yes	No
Would you sell?		
Would you rent?		
Reverse mortgage?		
<b>Your Savings</b>	Yes	No
Rainy day funds?		
Annuities?		
Bonds?		
<b>Your Income</b>	Yes	No
Social Security?		
Pension?		
Stock dividends?		
<b>Other Options</b>	Yes	No
Veterans Aid & Attendance?		
Life insurance conversion?		
Long-term care insurance?		

## Maximize Your Resources

Consider talking to a financial advisor and/or estate planning attorney to discuss how you could maximize your resources for senior living.

<b>Next Steps</b>	Yes	No
Are there additional tax deductions you should take?		
Is my investment portfolio focused on the right objectives?		
Are you eligible for any state or local benefits?		

***Learn more in our Dollars and Sense Financial Guide to Senior Living***