

Rightsizing Planner Worksheet: Calculate and Compare

Fill in the chart below to discover the real value of cottage retirement living.

Your Current Monthly Expenses		The Cove at Parkvue	Community #2	
1.	Mortgage, rent, condominium/ HOA fees	\$ _____	✓ \$ _____* (starting at \$1,350)	\$ _____
2.	Real estate/property taxes	\$ _____	✓ Included	\$ _____
3.	Water and sewer utility bills	\$ _____	✓ Included	\$ _____
4.	Lawn care/snow removal	\$ _____	✓ Included	\$ _____
5.	Homeowner's insurance	\$ _____	✓ Included (personal property coverage recommended)	\$ _____
6.	Groceries, dining out, gratuities	\$ _____	✓ 30 meals per month, no gratuities (leasing option excluded)	\$ _____
7.	Interior maintenance (painting, repair and replacement of appliances, heating, cooling, plumbing, electrical systems, etc., extermination and refurbishment)	\$ _____	✓ Included. No suppliers to find and supervise	\$ _____
8.	Exterior maintenance (painting, repair and replacement of roof, driveway, windows, etc., and refurbishment)	\$ _____	✓ Included. No missed deadlines and follow up to assure quality results	\$ _____
9.	Social/cultural events, entertainment, crafts/hobbies	\$ _____	✓ On-site and off-site programs included	\$ _____
10.	Newspaper and magazine subscriptions	\$ _____	✓ On-site library with a variety of publications	\$ _____
11.	Health club membership dues	\$ _____	✓ Included. On-site aquatic center with water aerobics and water yoga	\$ _____
12.	Housecleaning service (biweekly) and flat laundry service (weekly)	\$ _____	Can be arranged at an additional charge	\$ _____
13.	Gas	\$ _____	\$ _____**	\$ _____
14.	Electric	\$ _____	\$ _____**	\$ _____
15.	Trash	\$ _____	\$ _____**	\$ _____
16.	Cable TV and internet services	\$ _____	\$ _____**	\$ _____
17.	Other expenses	\$ _____	\$ _____	\$ _____
Total monthly cost of current residence		\$ _____	Total monthly fees \$ _____	Total monthly fees \$ _____

* These are monthly estimates only. Actual rates will vary based on contract type.

** Average monthly estimates.



3800 Boardwalk Blvd. | Sandusky, OH 44870
419.621.1900 | parkvue.org

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