

PERSONAL FINANCIAL WORKSHEET



Current Monthly Income

Social Security	
Total:	

Notes

Savings/Investments (Saving/CDS/Stocks/Bonds/Other Investments)

Personal Savings	
Total:	

Notes

Real Estate

Property	Estimated Sale value	Estimated Rental Income
Primary Home (Sale)		
Total:		

Notes

Personal Property/Other Assets

Item	Estimated Sale Value
Total:	

Notes

Other Important Questions

1. Do you have a long term care insurance policy?
2. Are you a veteran or the spouse of a veteran?
3. Do you have a life insurance policy?
4. Do you have anyone who can help pay for services (family, etc.)?
5. Do you need a shore term line of credit to make this transition?

Notes



Vision Senior Care PCH visionseniorcare@info.org
770.555.5555 555 Grayson Hwy Snellville, GA 30017



**Did you know
nearly 1 in 5
seniors
hospitalized
return in
30 days?**



Let Vision Senior Care help you before you go home!

Vision Senior Care Step-Down Program

Going home after a hospital or rehabilitation stay can be an overwhelming experience. New medications, follow-up appointments, even basic things like cooking and cleaning can be daunting. That's why Vision Senior Care is proud to offer seniors an extra month (or more) of recovery at our community for a very special reduced rate!

For less than the cost of a nightly hotel stay enjoy:

- A fully furnished room
- All meals
- 24 hour access to staff
- A Full social event calendar
- Medication assistance
- Dignified personal assistance if needed
- Just like home support services including home health

Call today to learn more about how Vision Senior Care PCH can assist you with your continued recovery.



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Financing Options

Looking for ways to help pay for living expenses?

VA Aid and Attendance

If you are a United States veteran or the surviving spouse of a veteran, you may qualify for the Aid and Attendance Program and receive monthly benefits to help cover the cost of care. Call us today and we will assist you in finding the appropriate VA representative to see if this program will benefit you.

Long Term Care Insurance

If you have a long term care policy it may offer benefits to pay for our services. Our community will work with you to provide the necessary paperwork to submit to the insurance company for approval.

Companion Living

This is an affordable option for individuals looking for cost savings while still enjoying all the services and amenities that we offer. Companion Living can also smooth the transition to our community by providing an opportunity to build a close friendship.

Tax Deductibility

The Internal Revenue service provides a deduction for medical expenses including the cost of care in a nursing home, personal care home or assisted living community if the primary reason for being there is to receive medical care. We encourage you to consult your tax advisor for a more detailed description of eligibility requirements. Find out more at www.IRS.gov.

Note: Community receives no compensation from any of the services mentioned nor should information be considered an endorsement of services.



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Is a Priority Deposit Right for You?

The Priority Deposit is Perfect For You If:

- You know our community is the place you want to be when the time is right OR
- You want to consider other options but you want to make sure our community is part of those options

Improve Your Chances When You are Ready to Move

The Priority Deposit allows future residents to select a preferred room and secure a number on the Priority Waiting list. Your number is important because even though we contact all members of the waiting list is an apartment becomes available, the higher you are on the list the greater your opportunity to secure an apartment.

Priority Now Means Priority In the Future

Unlike most waiting lists you don't fall to the bottom of the list if you aren't ready when a room becomes available. This means that your assigned number can only improve over time as others on the list join our community. That's why it makes good sense to secure your space sooner rather than later if you think our community might be an option for you.

Deposit Amount

The Priority Deposit is only \$100. The Priority Deposit is 100% fully refundable at any time for any reason!

Family Contact/Responsible Party: _____ Phone: _____

Current Address/City/State/Zip: _____

Future Resident: _____ Phone: _____

Current Address/City/State/Zip: _____

Email: _____

Room Style _____ Priority Waiting List Number _____

I have read and understand the guidelines for the Reservation Fee.

Future Resident/Responsible Party _____ Date _____

Community Representative _____ Date _____



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Retreat Stay



Vision Senior Care Respite Program

Vision Senior Care Retreat Program

lets your loved one join our Home as a resident on a temporary basis. Rooms are fully furnished and guests only need to pack a suitcase. Families use our Retreat option to plan for vacations, help during work or personal emergencies, or even to serve as an intermediate step before returning home after a medical emergency.

Retreat stay residents are a part of the family. They enjoy the same services and amenities as other residents in the home. Room furnishings, including television are provided.

Service fees are determined by the length of stay, and any special services needed. Our staff will be happy to provide you with a quote.



Call today to learn more about these wonderful options and our current availability.



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