Worksheet for Continuing Care Retirement Communities Prices and Fees

	Personal Data & Requirements								
Home Value, $	Single Occupancy	Double Occupancy	1 BR	2 BR	2 BR+	Years of Residence			
500,000		X		X		10			

	Priorities								
Low Price	Low Monthly Fees	Asset Preservation	LTC/ALU	FFS	Lifetime Cost				
1	4	3	2	5	6				

	Facility Data								
Facility Name	Entrance Fee, $	Monthly Fee, $	LTC/ALU/FFS	Refund, %	Discount*, %	Actual Entrance Fee, $	Actual Refund, $	Lifetime Cost w/Refund, $/Mo.	Lifetime Cost w/Discount,$/Mo.
A	530,000	4,393	LTC	90%		530,000	477,000	4,835	
B	260,400	2,183	FFS	100%		260,400	260,400	2,183	
C	282,000	3,180	FFS	90%		282,000	253,800	3,415	
D	177,475	1,396	FFS	90%		177,475	159,728	1,544	
E	360,500	2,495	FFS	100%		360,500	360,500	2,495	
F	281,400	2,812	LTC	90%	78%	219,492	0	0	4,641
G						0	0	0	
H						0	0	0	
I						0	0	0	
J						0	0	0	

*** Refund Discount assumed. If otherwise costs may change**

	Rankings								
Facility Name	Entrance Fee	Monthly Fee	LTC/ALU/FFS	Asset Preservation				Lifetime Cost, /Mo.	Overall Ranking
A	6	6	1	1				6	20
B	2	2	2	3				2	11
C	3	5	2	4				5	19
D	1	1	2	6				1	11
E	5	3	2	2				3	15
F	4	4	1	5				4	18
G									
H									
I									
J									