



KEENE VALLEY NEIGHBORHOOD SERVICES, INC.  
1782 NYS Route 73, PO Box 46  
Keene Valley, NY 12943  
Phone (518) 576-4474 | Email: kvnh@kvvi.net  
Website: kvnh.org

## FINANCIAL WORKSHEET

Writing down all your income, expenses, and assets will help determine how much you can spend on care. Keep in mind that at KVNH, all meals, utilities, laundry, and housekeeping services are included in the monthly fees.

### Monthly Income

Social Security \$ \_\_\_\_\_  
Pension \$ \_\_\_\_\_  
Veteran's Pension \$ \_\_\_\_\_  
Disability \$ \_\_\_\_\_  
Dividends \$ \_\_\_\_\_  
IRA/TDA/TSA \$ \_\_\_\_\_  
Other \$ \_\_\_\_\_

**Total Monthly Income** \$ \_\_\_\_\_

### Monthly Expenses

Rent/Mortgage \$ \_\_\_\_\_  
Auto Insurance \$ \_\_\_\_\_  
Health Insurance \$ \_\_\_\_\_  
Prescriptions \$ \_\_\_\_\_  
Medical Co-Pays \$ \_\_\_\_\_  
Outstanding Loans \$ \_\_\_\_\_  
Other Liabilities \$ \_\_\_\_\_

**Total Monthly Expenses** \$ \_\_\_\_\_

### BANK ACCOUNTS

Balance

Checking Account #1 \$ \_\_\_\_\_  
Checking Account #2 \$ \_\_\_\_\_  
Savings Account #1 \$ \_\_\_\_\_  
Savings Account #2 \$ \_\_\_\_\_  
Investment Account #1 \$ \_\_\_\_\_  
Investment Account #2 \$ \_\_\_\_\_  
Other Accounts \$ \_\_\_\_\_

### PROPERTY (to be sold)

Value of House \$ \_\_\_\_\_  
Value of Other Property \$ \_\_\_\_\_  
Value of Vehicle(s) \$ \_\_\_\_\_

### LONG-TERM CARE POLICY

Value of Policy \$ \_\_\_\_\_