

# Windsor Run Monthly Cost Worksheet

**So Much for Your Money.** You may be surprised by how much is included when you live at Windsor Run, like home maintenance, utilities, and even property taxes. Use this easy worksheet to find out what your house is costing you. Then compare your results.

Monthly Expenses	Current	Windsor Run
Mortgage or rent	\$	\$
Homeowners/renters insurance*	\$	\$
Flexible meal plan	\$	Included
Entertainment	\$	Included
<b>Lifestyle Expenses</b>		
Lawn, tree, and shrub care	\$	Included
Snow removal	\$	Included
Gutter cleaning	\$	Included
Painting and repair; structure	\$	Included
Roof repairs	\$	Included
Major appliance maintenance/repair	\$	Included
Trash removal	\$	Included
Homeowners association dues	\$	Included
Real estate tax	\$	Included
Security	\$	Included
Heating and cooling system maintenance/repair	\$	Included
Pool maintenance/repair	\$	Included
Pest control	\$	Included
Activities**	\$	Included
<b>Utilities</b>		
Electric	\$	Included
Gas	\$	Included
Water and sewer	\$	Included
Cable TV	\$	Included
Phone and wireless internet	\$	Included
<b>Other</b>		
Health/fitness club membership	\$	Included
24-hour monitored EMT response system	\$	Included
Local scheduled transportation	\$	Included
<b>Total</b>		
	\$	\$

\*Renters insurance for personal property is considerably less than homeowners insurance.

\*\*Some small fees to cover expenses for crafts, materials, and college classes, etc.

# More than you imagine **for less than you expect**

## What does it cost to **live better at** **Windsor Run**

In an Erickson Living® community, there are two major financial components: the initial cost (your 90% Refundable Entrance Deposit†) and an affordable Monthly Service Package. Think of the Monthly Service Package as your current expenses—utilities, taxes, homeowners insurance, assessments, homeowners association dues, repairs, and maintenance.

### Example:

Linda Smith (not an actual person, but typical of many Erickson Living residents.) Linda isn't wealthy, but her house is paid for and she has modest savings and investments.

Linda's Assets:	
Value of House	\$299,000
Savings Account	\$29,000
Checking Account	\$7,500
Stocks & Bonds/IRA	\$69,000
Certificates of Deposit	\$8,500
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Total Net Assets	\$413,000

Her monthly pension and Social Security cover all of her bills, home maintenance, and yard care with enough left to travel occasionally.

Sources of Monthly Income:	
Social Security	\$1,090
Pension	\$1,475
Interest Income	\$375
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Total Monthly Income	\$2,940

### Linda's new home at Windsor Run (The Carlisle)

Linda plans on taking full advantage of all the amenities in the Woodland Commons Clubhouse, and she doesn't want extra rooms to clean, so the Carlisle, a one bedroom, one and a half bath, is a good choice for her.

The new proceeds from the sale of her house cover her entrance deposit of \$238,000 and, with her other assets, leave her \$175,000 to spare.

Linda's income of \$2,940 leaves her plenty of spending money above the \$2,190 Monthly Service Package.

To see how you can enjoy an unparalleled lifestyle for the same or less than you're spending now, use the simple worksheet on the back.

†As per the Residence and Care Agreement.



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