



Senior Care Cost Specialists

Mark Easley • Juris Doctorate, President

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Financial Face Sheet

Resident Name:	Margaret Jones	Marital Status:	Widowed
Primary Contact:	Sally Responsible	Relationship:	Daughter
Contact Information:	1102 Elm Avenue St. Louis, MO 63122 314-314-7777	Date:	September 1, 2023

Spend Down Analysis

Margaret Jones:	Total Spend Down Assets:	\$125,402.00
	Accessible Assets:	\$26,785.00
	Moderately Accessible Assets:	\$23,617.00
	Problem Assets:	\$75,000.00
	Exempt Assets:	\$120,000.00
	Outstanding Debt:	\$0.00
	Spousal Share:	\$0.00

Spend Down Time Horizon

Estimated date of spend down completion (resident keeps exempt asset(s))	February, 2025
Estimated date of spend down completion (resident sells exempt asset(s))	April, 2026

Income and Monthly Deficit

Monthly income Total	\$1,220.00
Monthly Payment Deficit	\$7,780.00
Monthly LTC Cost	\$9,000.00

Relevant Gifts

Past Gifts:	Yes
Amount:	\$23,000.00
Date:	May, 2020
Waiting Period Expiration:	June, 2025

Capacity Review

Capacity:	Yes
Power of Attorney:	No
Need for Conservatorship:	No

Individuals Needed to Liquidate Assets

1. Alex Thompson	Asset 4-Farmland
2.	
3.	

LTC EZ Score:

85-16