

ALTCS Resource Worksheet

STEP #1 LIST ASSETS

Bank Accounts/Savings	\$	
(Checking, money market, CD's)	\$	
Investment Accounts (brokers)	\$	
Stocks	\$	
Bonds	\$	
Pension Plans (IRA's)	\$	
Other Real Property	\$	
Primary Home	\$	
Household Items	\$	
Primary Vehicles	\$	
Life Insurance/Annuities	\$	
Pre-Paid Burial Plans/Plots	\$	
Promissory Notes	\$	
Other Vehicles/Boats/Trailers	\$	
TOTAL ASSETS		\$

STEP #2 LIST EXEMPTIONS

Primary Home	\$	
Household Items	\$	
Primary Vehicle	\$	
Pre-Paid Funeral Plans	\$	
Burial Plot	\$	
TOTAL EXEMPTIONS		\$

STEP #3 CALCULATE NET ASSETS

Total Assets	\$	
Less Total Exemptions	\$	
TOTAL NET ASSETS		\$

STEP #4 CALCULATE SPEND DOWN

Net Assets	\$	
Less Asset Allowance		\$

ASSETS SUBJECT TO SPEND DOWN

TOTAL		\$
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