



SPEND DOWN WORKSHEET

Estimate the amounts of money that you will “spend down” on any of the following goods and services. Note that the money must be spent and the goods or services delivered within the calendar month when you receive your money. Keep receipts so that you can provide these to the Social Security Administration if you are asked to document the expenditures.

- Purchase of home \$ _____
- Home improvements, repairs or maintenance \$ _____
- Tools to perform home improvements \$ _____
- Installation of burglar alarm or monitoring/
response system \$ _____
- Advance payment of utilities,
homeowner’s insurance \$ _____
- School tuition, books and supplies \$ _____
- Health and life insurance premiums \$ _____
- Entertainment (including books,
magazines, any vacation travel) \$ _____
- Handicap van \$ _____
- Household goods \$ _____
- Non-refundable airline ticket \$ _____
- Stereo system \$ _____
- Television set \$ _____
- Medical insurance \$ _____
- Telephone bills \$ _____
- Newspaper subscriptions \$ _____
- Furniture \$ _____

- Services of care manager \$ _____
- Tax payments \$ _____
- Funeral \$ _____
- Legal fees \$ _____
- Transfers to third parties \$ _____
- Mortgage payments \$ _____
- Credit card bills \$ _____
- Other outstanding debts and bills \$ _____