

Let's get organized!

For Your Family

- Write important dates in your planner or phone.
Ex: birthdays, anniversaries, vacation, etc.
- Start organizing receipts and gathering necessary tax documents.
- Make yearly appointments for the family (doctor, dentist, orthodontist, etc.) and set reminders.
- Improve your physical and financial health with meal planning.
- Identify and donate gently used clothes, books, games, and household goods no longer needed.

For Yourself

- Clear out your email inbox and computer hard drive (back up the important stuff first).
- Declutter your workspace.
- Prioritize your emotional well-being.
- Check your car's maintenance schedule and make an appointment if needed.
- Review or implement estate planning documents.