

EFFICIENT, ORGANIZED, PRODUCTIVE... TIPS AND IDEAS FOR EVERYDAY LIFE



9 Categories for Organizing Financial Documents

1) Insurance

Have a folder for insurance documents. You need to be able to easily retrieve these when needed. Types of insurance policies include the following:

- Home
- Renters
- Condo
- Auto
- Life
- Health
- Bonds (if necessary)

You have to be able to retrieve policy information when needed, especially if a claim arises.



2) Utility or monthly bills

Keep a folder to collect your monthly bills and utility bills. These include the following:

- Telephone
- Electric
- Water
- Trash/sewage
- Telephone
- Internet
- Car payment notice
- Insurance payment notice



-continued on next page

9 Categories for Organizing Financial Documents (Cont'd)

3) Paystubs and income-related documents

Keep copies of your pay stubs. You never know when you might need them! Have a separate folder for paystub copies, W9 forms, W4 forms, and other income-related documents. Keep everything with a business (if you operate a side business) separate from your personal expenses.

4) Tax documents

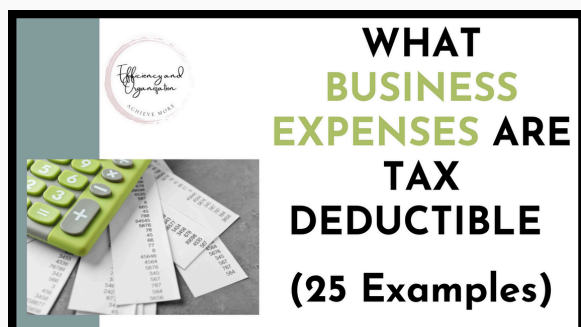
It is essential and necessary to keep your tax documents, including W2 forms, receipts, and tax return copies.

5) Investment or retirement documents

Keep a folder if you have money invested in any of the following categories below.

- 401K plans or retirement plans
- Annuities
- Pensions
- Stock/mutual fund investments
- Long-term savings accounts or CDs (certificates of deposit)
- Stocks

[CLICK HERE TO READ THE ENTIRE ARTICLE WITH SPECIFIC EXAMPLES.](#)



COMING SOON!

September

LABOR DAY
SEPTEMBER 2

PATRIOTS DAY
SEPTEMBER 11

HISPANIC HERITAGE
MONTH

FIRST DAY OF FALL
SEPTEMBER 22

October

FILIPINO AMERICAN
HISTORY MONTH

NATIONAL BOSS' DAY
OCTOBER 16

RED RIBBON WEEK
OCTOBER 23 - 31

DIWALI
OCTOBER 31

HALLOWEEN
OCTOBER 31

How to Write Action Plans for Goals

What we desire for ourselves and our future can be set as goals. Then, we take these general goals and write them as SMART goals. By doing so, we make more specific plans for the future. Reaching goals becomes more attainable. Wishes and desires become specific, timely, actionable goals to work towards achieving. We live more intentionally and purposefully.

How to Write SMART Goals

SMART goals are one of the most effective ways to set and achieve goals. The acronyms are Specific, Measurable, Attainable, Realistic, and Timely. Here are 3 examples of how to take general goals and convert them to SMART goals:

General goal: "I want to read more."

SMART goal: "I will read 10 books in the next 12 months."

General goal: "I want to be kinder."

SMART goal: "I will be kinder by reminding at least 2 people each week what one or more of their best qualities are."

General goal: "I want to be better off financially."

SMART goal: "I will pay off my credit card debt within 2 years."

What changed? Instead of just stating a desire, we took ownership of what we would do by starting with an "I will" statement. We also set a time boundary or deadline to hold ourselves accountable for achieving the goal. SMART goals are an excellent way to set specific and achievable goals. Short-term goals can be achieved in less than 1 year, and long-term goals take more than a year to complete.

My Goal #1

Goal 1:

My Specific Strategies and Action Plans:

How often will I stop and monitor my progress?

How will I celebrate when I accomplish or achieve the goal?



How to Write Action Plans for Goals (cont'd)

PROCESS OF ACHIEVING GOALS

a) Articulate your vision and goal in writing.

Writing down your goals makes achieving them far more likely. Research shows that those who write them down hold themselves accountable more and increase their chances of success by 1.4 times.

b) Get yourself in the right mindset that you will achieve the goal. You will not give up.

c) Choose 3 to 5 action daily, weekly, and monthly action plans. Write them down in a planner and calendar. Hold yourself accountable for achieving them. Use a digital or paper planner with a calendar. It will help you stay organized and intentional with everything you do!

d) Place the written goal and action plans somewhere highly visible to refer to frequently. Conduct a self-reflection once a week at a set time to determine whether you are committed to your goal.

EXAMPLES OF ACTION PLANS FOR GOALS

Here are 5 examples of SMART goals with 5 action plans for each. These samples are meant to provide a guide. They can be altered to suit each person's needs and situations. It's best to work on up to 3 goals at one time to avoid feeling stressed and overwhelmed. Action plans are meant to be doable tasks that can be completed daily, weekly, biweekly, and monthly. They must be written in a planner and calendar as to-do items on a checklist.

Example #1

Vision:

Being healthier

SMART goal:

I will do 5 things to be more active for the next 12 months.

5 Action plans:

- Running 2 miles daily
- Putting in 10,000 or more steps 5 days per week
- Going hiking once a month
- Getting up and walking at least 5 minutes every hour
- Gardening or cleaning the home for 1 to 2 hours per week

[CLICK HERE TO READ THE ARTICLE WITH 5 EXAMPLES OF ACTION PLANS.](#)

How to Start Organizing a Messy Bedroom



1) Write a SMART goal to decide when you want the bedroom project completed, organized, and decluttered.

2) List things you want done in your messy bedroom.

- Remove all pictures, photos, documents, etc. from all 4 walls.
- Wash all clothes on the floors, under the bed, and behind furniture, then stack them neatly after sorting.
- Change bed sheets, wash, and make the bed.
- Empty out drawers and cabinets, then reorganize using dividers.
- Get rid of the trash in the room including empty bottles, cans, bags, etc.
- Clean or wash window coverings.
- Change lamps or lights if needed.
- Add only 1 or 2 items on walls, such as fake plants and paintings, just for aesthetics, decluttering all else.
- Create a box for items to donate.
- Donate or get rid of shoes that have not been worn for more than a year.
- Donate or get rid of clothes that have not been worn for more than a year.
- Clean and organize the desk (if there is a desk in the bedroom).
- Hide the wires of all technology.

You want to be able to see the walls, the floors, and tops of your few furniture pieces. The less you have, the more open and spacious the room will appear, giving you a sense of clarity and focus.

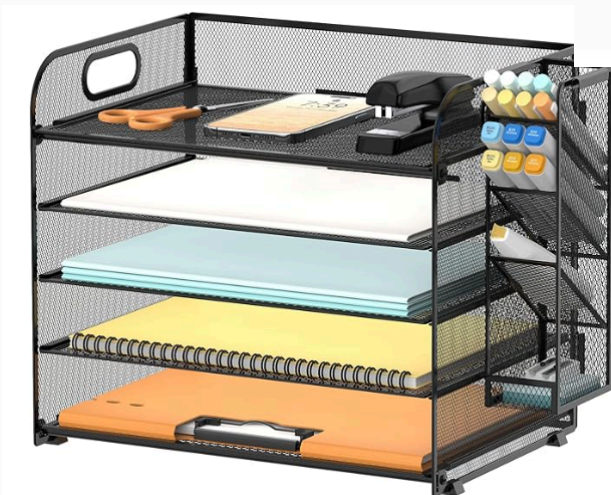
3) Empty the room thoroughly to clean walls, lights, and floors.

4) Decide what to keep and what to throw out (or donate).

[CLICK HERE TO READ THE ENTIRE ARTICLE WITH HELPFUL TIPS.](#)

ORGANIZING TOOLS FROM AMAZON.COM

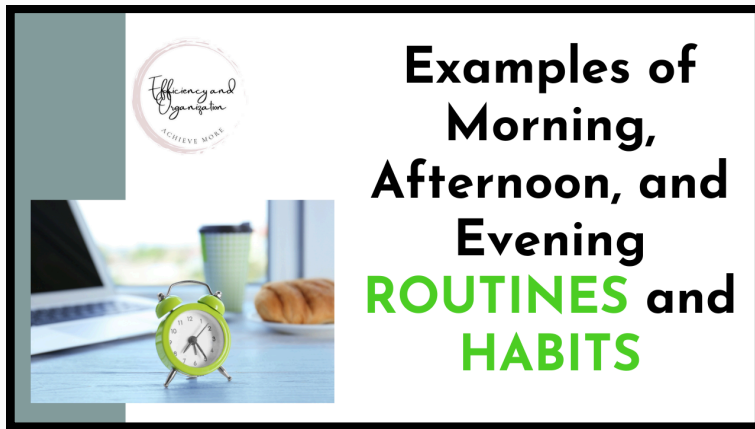
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7 Tips for Reading Self Help Books

1. Read each chapter. Highlight or underline the parts and pieces that resonate with you the most.
2. When you get to the end of the chapter, go back, and read the highlighted or underlined sections only.
3. Based on those highlighted and underlined sections, write down what specifically you want to do to make changes in your life.
4. Turn each specific thing you want to change into a goal. Make sure the goal is as specific as possible with a due date or a deadline.
5. Write the goals down using a notebook, a goal form, or a vision board. You can measure your success if the goals are written down, specifically with a timeline or due date.
6. For each goal, come up with specific action plans or steps – specific things you will do to achieve the overarching goal.
7. Monitor each of the goals you set periodically to make changes and improvements in your life after reading the self-help books.

[CLICK HERE TO READ THE ENTIRE ARTICLE ON THIS TOPIC.](#)

