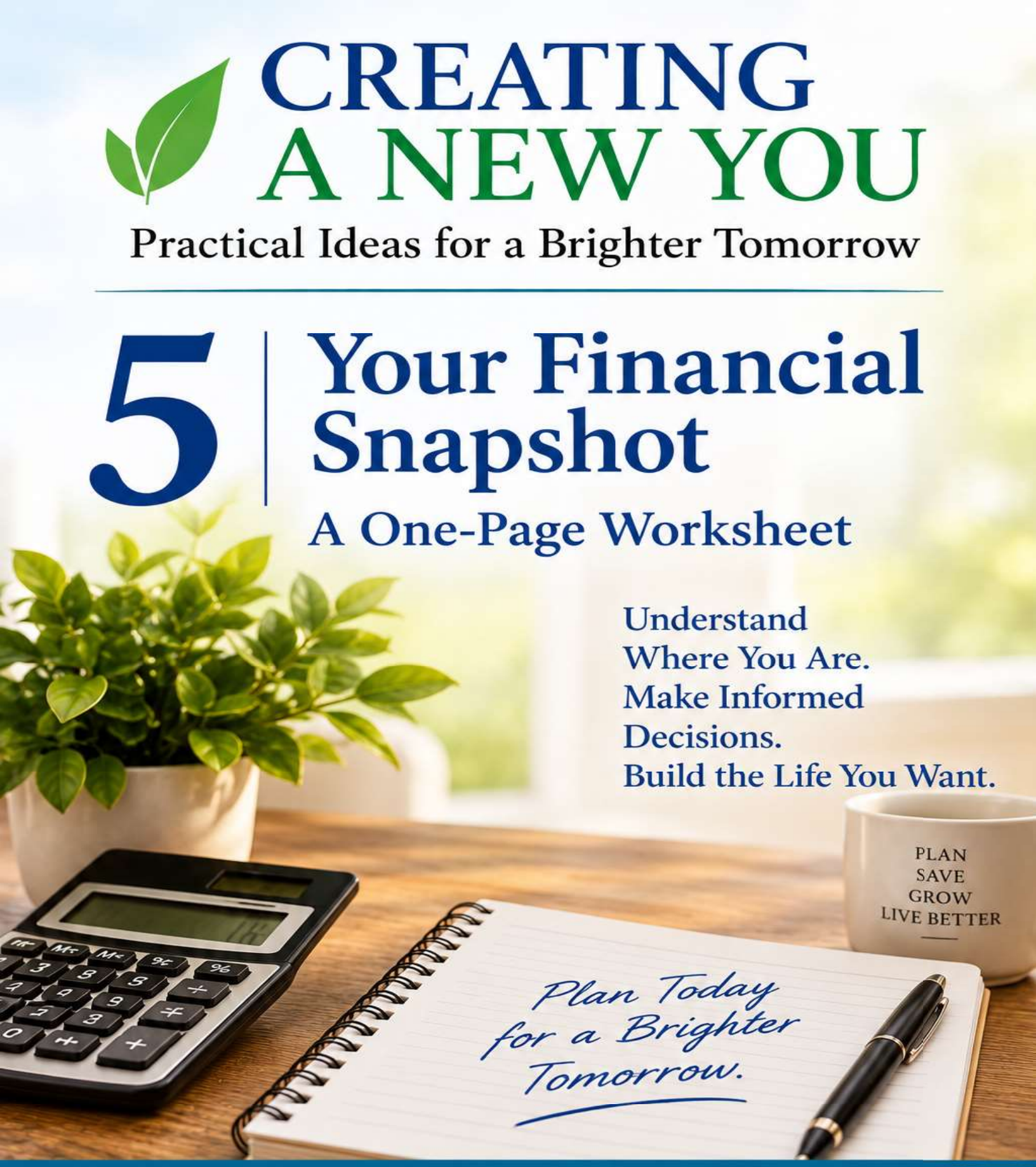
# CREATING A NEW YOU

Practical Ideas for a Brighter Tomorrow

# 5 | Your Financial Snapshot

## A One-Page Worksheet

Understand
Where You Are.
Make Informed
Decisions.
Build the Life You Want.




Leonard Prather

Prather Publishing Company

# GETTING ORGANIZED

## A Personal Organization Guide

### Making Everyday Life Easier to Manage

Being organized does not mean everything has to be perfectly arranged or that you need a system for everything.

It means being able to find what you need, keep track of what needs to be done, and manage the things that are important to you.

Sometimes, small areas of disorganization can create bigger problems—lost time, forgotten responsibilities, misplaced information, unnecessary purchases, or frustration.

Use this guide to take a closer look at how organized you are, identify areas that may need attention, and decide what you want to do about them.

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## 1. Where Could You Be More Organized?

Think about the things you manage in your everyday life.

Consider:

- Bills and financial records
- Important documents and paperwork
- Appointments and schedules
- Email and other communications
- Household items
- Work or business responsibilities
- Personal belongings
- Computer and electronic files
- Tasks and things you need to remember
- Projects you have started but not completed

**For example:** You may have important papers in several places, regularly search for things you know you have, forget an occasional appointment, or have several unfinished tasks competing for your attention. These can be easily managed. For example, add appointments to your phone calendar the moment you make them. Put important papers in a folder and keep the folder in a designated place. When you remember an unfinished task, write it down so you don’t forget it again.

**What areas of my life could be better organized?**

**1.** _____

**2.** _____

**3.** _____

**4.** _____

**5.** _____

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# 2. What Is Already Working?

Before deciding what needs to change, consider what is already working.

You may have certain things you manage very well.

**For example:** You may always pay your bills on time, keep your appointments on your phone, know exactly where your important documents are, or prepare a list before grocery shopping.

**What do I currently keep organized?**

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**What am I doing that helps me stay organized?**

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**Is there something I already do that could work in another area of my life?**

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# 3. Where Is Disorganization Creating a Problem?

Being somewhat disorganized does not necessarily mean something needs to change. It may simply mean you need a better plan.

Ask yourself: Is disorganization affecting you? Do you shrug it off as not being a problem?

**For example:** A desk with papers on it may not matter if you know where everything is. But regularly searching through those papers for bills, receipts, or important documents may be costing you time and creating frustration.

### Where do I regularly have difficulty finding something I need?

### What do I sometimes forget or have difficulty keeping track of?

### Is disorganization costing me time or money?

Think about late charges, duplicate purchases, missed appointments, lost documents, or time spent looking for things.

### Is there anything I keep saying, "I need to get this organized"?

## 4. Choose One Area to Organize

You don't have to organize your entire life.

Choose one area that you would benefit from organizing right away. And, make that a priority.

**Hint:** Start with something that bothers you regularly, causes you a problem, or perhaps even frustrates you. These can be motivating factors to get organized and give you a sense of accomplishment once it's done.

**For example:** Instead of deciding *"I need to organize the whole house,"* you might start with a common used area in the house. Or, perhaps, your bills and important papers.

### The area I want to organize is:

### Why did I choose this area?

### What problem would organizing it help solve?

## 5. Decide What “Organized” Means to You

Before you start, think about how getting organized will affect your life. Even if it is a small simple thing.

You do not need an elaborate system. You just need something that works.

**For example:** Organizing important paperwork might simply mean having one place for bills that need attention, another place for documents you need to keep, and discarding papers you no longer need. If this task is too big to start with, find a smaller one. For example, organize your desk, bedroom, or a small area of the house. You don’t want to take on a big task to start. Begin with something smaller and manageable, and see how motivating it can be to see the change.

### When this area is organized, what will be different?

### What do I need to be able to find or keep track of?

### What would make this easier for me to manage going forward?

## 6. Decide How You Will Get Started

Once you know what you want to organize, break the task into manageable steps.

**For example:** If you want to organize your paperwork, you might:

1. Gather the papers into one place.
2. Separate what requires action from what needs to be kept.
3. Discard what you no longer need.
4. Decide where each type of document will be kept.
5. Put new paperwork in the appropriate place as you receive it.

The objective is not to finish everything immediately. It is to know where you are going to start.

### What is the first thing I need to do?

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### What comes next?

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### Is there anything I need before I begin?

Think about folders, containers, labels, a calendar, an app, storage space, or simply time to work on it.

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### When will I start?

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# 7. Keep It Organized

Getting something organized is one thing. Keeping it organized may require changing what you do afterward.

Think about what caused the area to become disorganized in the first place.

**For example:** Open your mail every day so you can immediately see what can be discarded and what needs your attention. Put the items you need to keep in a designated folder or place. It is easier to keep up with a few pieces of mail than a stack that has accumulated for weeks or even months. If unopened mail regularly piles up, organizing the existing pile and deciding where new mail goes may prevent the same problem from recurring.

## What caused this area to become disorganized?

## What can I do differently going forward?

## Is there a simple routine that could help?

## Take a Closer Look

### What is working?

### What still needs attention?

### Is this area becoming easier to manage?

☐ Yes ☐ No ☐ I need to adjust my approach

## What's Next?

Look at what you have accomplished.

Are you ready to organize something else? Or, do you need more time with the current task?

# 8. Take One Area at a Time

Once you begin organizing one area, you may notice several others that need attention.

Finish what you started—or get it to a point where it is manageable—before deciding what deserves your attention next.

**For example:** Organizing your financial paperwork may lead you to realize that your computer files also need attention. You don't have to stop what you are doing and begin another project. Make a note of it and come back to it later.

Ask yourself:

**What would make my everyday life easier?**

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### My Commitment

**The area I am organizing is:**

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**The first thing I will do is:**

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**I will start by:**

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# A Final Thought

Getting organized is not about making everything perfect. It is about making the things you manage easier to find, remember, and take care of.

Start with something that matters to you. Make it manageable. Then decide what needs your attention next.

**A little organization can make everyday life a little easier.**

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