

2020

PLANNING ROUTINE

WEEKLY

- Schedule deadlines
- Schedule home and personal tasks
- Update calendars as needed
- Meal plan
- Cleaning checklist
- Weekly budget / expenses

BI WEEKLY

- Organize pockets
- Remove/archive daily inserts
- Condense front pockets and sections

MONTHLY

- Create monthly content calendar
- Outline monthly overview
- Update monthly income tracker
- Purchases and expenses
- Create monthly budget
- Update business expense report

QUARTERLY

- Review tax files
- Fill in annual review
- Review content list
- Archive old inserts
- Review business expenses

YEARLY

- Reorganize filing cabinet
- Archive old files
- File new documents
- Analyze Annual Review
- Review yearly tax info

MISC

- Clean binder + rings
- Condense sections and reorganize
- Review set up and planning routine