



How to Compile, Organize and Document Monthly To Do Checklist

You can do this! Just start. Add everything you can think of.

You can add and delete things at any time. This is a living checklist – just like you!

Steps

1. On a blank page, write down everything you can think of right away (when you start doing the below, you can add the month/date and durations)
2. When reviewing below make sure to add the month, date and how often (yearly, monthly, bi-monthly, quarterly, bi-yearly, etc.)
 - Review a year's worth of payments (*checkbook, credit cards, etc.*)
 - Review a year's worth of schedules
- Put in date order and add under specific month

Suggestions

Electric	Gas	Waste and Water
Cable / Internet	Phone	Mortgage
HOA	Vehicle Payment	Vehicle Sticker
Memberships	Donations	Anyone to Contact
Business Information	Information to Tax Person	Information from Tax Person
Information to Send Out	Contract Renewals	Taxes (Federal, State, Estimated, Business, etc.)
Insurance (Home, Life, Medical, Vehicle, etc.)		