

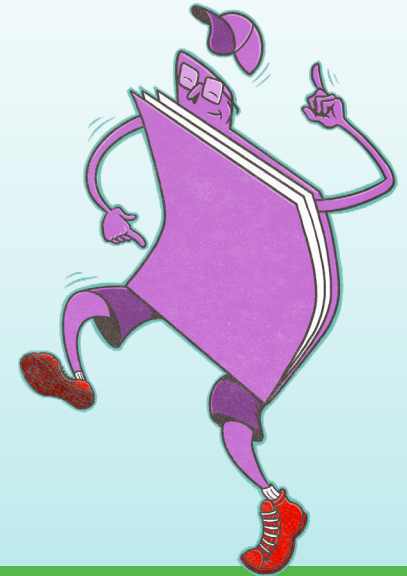
TRUE CONFESSIONS

Paperwork & Money Self-Audit

Would you speed down the highway at 90 MPH leaving your ID at home and expired auto registration? You're doing the same thing when your paperwork and finances are disorganized. Whether you are constantly looking for lost papers or are on top of your game, here's a place to start-an easy self-check for your eyes only. See where you're hot and where you're not!

Organization Categories:

- PAPERWORK & FILES
- DIGITAL ORGANIZATION
- KEY DOCUMENTS
- TIME TRACKERS
- CONTACT STORAGE
- MONEY TRACKING
- ON-TIME PAYMENTS
- WEALTH BUILDING



Adding Up the Checkmarks:



If most of your checkmarks are green, you are organized. Congrats! Now put a bow on the things that you are doing well and then go for the yellow and red checked areas.

If most of your checkmarks are yellow, you are ready for a challenge. Notice if these checkmarks trend in a specific category and focus your energies there.

If most of your checkmarks are red, you will show the most improvement! Start with the category that seems the easiest and most interesting. See my other free and easy offers that will support you in these areas.

How are your financial papers, files, and money?

Check the box that is closest to reality and see what needs the most attention.

1. PAPERWORK & FILES	Red Zone		Yellow Zone		Green Zone	
Papers: Filed, labeled	No filing system		Outdated filing		Labeled — periodically weeded	
Paper piles #	10+ boxes of misc. papers		5 boxes of misc. papers		1-4 boxes of misc. papers	
Tax returns separated from regular files	No — mixed together		Somewhat separated		Separated	
Tax returns for past 7 years securely stored	I don't keep my taxes. When they're done, so am I.		Stored, but they are exposed to water, fire, or snoopers		Separated and well stored — easily accessible yet secure	
Business papers separated from personal	No		More or less		Yes	
Desktop condition	Covered in piles		A few piles		No piles	
File cabinets condition	Jam-packed — not weeded in over 2 years		Full — needs weeding		Periodically weeded	
Personal documents & paperwork	In unmarked boxes — mixed with business or official documents		Mostly separated from business or official documents		Separated from business documents. Archived in an organized fashion.	

2. DIGITAL ORGANIZATION	Red Zone		Yellow Zone		Green Zone	
Digital files: what is status of computer desktop	Covered with files & apps — hard to find what I'm looking for		Partly covered with files & apps. Some random outdated info.		Current files & apps. Easy to find what I'm looking for.	
Digital files	Minimal filing and random		More or less filed — not updated recently		Organized and filed recently	
Passwords — how are they secured	On sticky notes		All on one piece of paper		Protected e-file or password app	
What accounts have online access	None		Several		All or almost all	

3. WHERE ARE YOUR KEY DOCS?	Red Zone		Yellow Zone		Green Zone	
Official ID and passport	Don't know		Scattered — in various places		In one locatable safe spot	
Social Security card	Don't know		Scattered — in various places		In one locatable safe spot	
Credit cards	Don't know		Scattered — in various places		In one locatable safe spot	
Birth certificate (official)	Don't know		Scattered — in various places		In one locatable safe spot	
Marriage certificate (official)	Don't know		Scattered — in various places		In one locatable safe spot	
Divorce decree (official)	Don't know		Scattered — in various places		In one locatable safe spot	
Health insurance cards and health records	Don't know		Scattered — in various places		In one locatable safe spot	
Auto title (s)	Don't know		Scattered — in various places		In one locatable safe spot	
Rental or mortgage agreement (s)	Don't know		Scattered — in various places		In one locatable safe spot	
Property taxes (historical)	Don't know		Scattered — in various places		In one locatable safe spot	
Insurance: auto, home, life, etc.	Don't know		Scattered — in various places		In one locatable safe spot	

4. TIME TRACKERS	Red Zone		Yellow Zone		Green Zone	
Calendar – paper and/or digital	None		Several — I miss appointments		Working — rarely miss appointments	
MySocialSecurity.gov account	None		Yes — not checked last 6 months		Yes — check quarterly	

5. CONTACT STORAGE	Red Zone		Yellow Zone		Green Zone	
Contact information	Scattered in several places		One or two places		One place up to date	
Mobile Phone Abilities	Not comfortable except for calls		Can text, call, and email		Using apps and fancy tricks	

6. MONEY TRACKING	Red Zone		Yellow Zone		Green Zone	
What kind of accounting system do you have in place?	None or unused system		System used occasionally		Workable system — used regularly	
Autopay recurring bills or E-payments	None		Some		All or almost all	

7. ON-TIME PAYMENTS	Red Zone		Yellow Zone		Green Zone	
Rental or mortgage	No online access — paying by check		Online access		Online access — paying electronically	
Electricity	No online access — paying by check		Online access		Online access — paying electronically	
Gas	No online access — paying by check		Online access		Online access — paying electronically	
Phone - landline, mobile	No online access — paying by check		Online access		Online access — paying electronically	
Security system	No online access — paying by check		Online access		Online access — paying electronically	
Internet	No online access — paying by check		Online access		Online access — paying electronically	
Credit card #	No online access — paying by check		Online access		Online access — paying electronically	
Credit card #	No online access — paying by check		Online access		Online access — paying electronically	
Bank/credit union #	No online access — paying by check		Online access		Online access — paying electronically	
Bank/credit union #	No online access — paying by check		Online access		Online access — paying electronically	
Other monthly payment	No online access — paying by check		Online access		Online access — paying electronically	
Other monthly payment	No online access — paying by check		Online access		Online access — paying electronically	
Insurance: auto, home, life, long-term etc.	No online access — paying by check		Online access		Online access — paying electronically	

8. WEALTH BUILDING	Red Zone		Yellow Zone		Green Zone	
Credit cards	Mix — expired, current, etc.		Known — need to review		Known — right-sized	
Credit score/Credit report	Don't know — no report, have pending debt		Known — not done in 1 year — paying off debt		Known — recent paying off debt	
\$1000 Emergency fund	None		In place — \$0-500		In place — \$500-1,000	
6-Month expense cushion	None		In place — 0-3 months saved		In place — 3-6 months saved	
Retirement long-term savings	None		In place — contributions random		In place — regular contributions for optimal tax savings	
Health saving account	None		In place — contributions random		In place — regular contribs for optimal tax savings	
Banking frequency	Check rarely or several times/day		Check randomly or rarely		Check several times/week	

TOTAL CHECKS PER COLOR ZONE

TOTAL RED CHECKS

TOTAL YELLOW CHECKS

TOTAL GREEN CHECKS