

Planning Notebook

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Chapter 1

Introduction

I don't like long introductions generally, so if this is too long for you, just read "An Important Note" below and get on with life.

1.1 Origins

I created this for one main reason: I have a hard time getting and staying organized, especially with regard to financial matters. Part of this is no doubt due to my background (I did not grow up in an environment where people moved money around to benefit themselves) and undiagnosed ADHD (which is something I'm also looking into).

Also, I had a hard time making this and making it look nice with the tools I had available to me. (I like to do a lot of design things in my spare time and

have spent countless hours questioning whether to go with a 10pt font size or a 10.5pt font size. The struggle is real.) Because I like learning new things, I decided to finally learn how to use \LaTeX . I have no idea what took me so long—the learning curve is not steep and it's remarkably powerful. Because it's basically a text file, I can compile it to a pdf file to share, but I can also share it via Git for those who want to create their own version.

1.2 An Important Note

You don't have to wait until the beginning of a new year to start this. In fact, I suggest that you avoid New Year's Day to make any major changes in your life. There is already so much going on, what with it being the height of the holiday season for most western religions. As well, people *expect* you

to commit to changes. (And take delight in when you fail.)

Rather, start where you are, and make changes as gradually or as quickly as you feel comfortable with. As the cliché goes, there's no time like the present.

1.3 A Minor Note

Like I mentioned above, I've generated this document using \LaTeX . As a result, this document is subject to all the limitations of \LaTeX , and more specifically, my limited (though growing) abilities

with \LaTeX . If you want to correct any markup errors I've made (and I'm sure there are plenty), please contact me.

1.4 Why Do People Have Trouble Keeping Track of Things?

Chapter 2

Goals

Let's talk about goals.

Presumably you want to make a plan because you have some end in mind—something in your life that you want to change, see more of, or see less of. We're going to work on a year-long plan to get you at least partway to those goals.

What

This is the easy part. "What" means what you actually want to achieve. This can be anything from "lose ten pounds" to "save \$2,000 for a down payment on a new car". Whatever you choose, it must be *specific* and *measurable*. In other words, it has to be something you can see. This is why most people who fail to achieve a goal: it's not specific. You can

There are six parts to setting and achieving a goal, and if you studied journalism in high school or college, you'll recognize them. Those six parts are what, who, when, where, why, and how. Let's look at each one in a little bit more detailed.

easily tell if you've gained ten pounds just by getting on a scale. You can easily tell whether you've saved money by looking at your bank balance.

But if your goal is "get more organized" there's no way to measure "organized". The way out of this dilemma is to stop and think about what that's going to look like.

Chapter 3

Annual Goals

Okay, let's make some goals for the next 365 days.

Chapter 4

Monthly and Weekly Goals

Chapter 5

Weekly Task List

I find it helpful to keep track of what household chores need to be done. That way, I don't spend an entire day each weekend just cleaning house and catching up on laundry, and I can plan ahead for needed supplies. If you have a busy household, you may find it handy to print out the following page, fill in the chores and assignments, and then lami-

nate it and stick it on the front of your refrigerator. Everyone can then use a whiteboard marker to cross off their chore when it is done. You can then have a celebration on Sunday night when everything is done and you can wipe the entire sheet clean again, ready for the next week.

Weekly Tasks

Day	Task	Assigned To
Mo		
Tu		
We		
Th		
Fr		
Sa		
Su		

Chapter 6

The Year

The rest of this planner consists of 52 weeks of planning pages.

Week 1

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 1

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 2

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 3

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 3

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 4

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 4

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 5

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 5

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 6

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 7

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 7

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 8

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 8

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 9

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 10

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 11

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	
Hoping For:			

Week 12

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 13

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 13

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 14

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 15

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 16

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 16

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 17

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 18

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 19

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 19

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 20

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 20

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 21

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 21

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 22

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 23

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 24

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 24

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 25

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 26

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 26

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 27

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 28

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 28

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 29

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 30

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Goals for this Year		Goals for this Month	

Hoping For:

Week 30

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 31

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Goals for this Year		Goals for this Month	

Hoping For:

Week 31

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 32

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Goals for this Year		Goals for this Month	

Hoping For:

Week 33

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 33

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 34

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 34

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 35

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Goals for this Year		Goals for this Month	

Hoping For:

Week 35

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 36

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Goals for this Year		Goals for this Month	

Hoping For:

Week 37

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Goals for this Year		Goals for this Month	
Hoping For:			

Week 38

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Goals for this Year		Goals for this Month	

Hoping For:

Week 38

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 39

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Goals for this Year		Goals for this Month	

Hoping For:

Week 39

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 40

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Goals for this Year		Goals for this Month	

Hoping For:

Week 41

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
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Goals for this Year		Goals for this Month	

Hoping For:

Week 41

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 42

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Goals for this Year		Goals for this Month	

Hoping For:

Week 42

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 43

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 44

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
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Goals for this Year		Goals for this Month	

Hoping For:

Week 44

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 45

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
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Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 46

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
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Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 46

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 47

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 47

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 48

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 49

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 50

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Th			
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Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

Week 51

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
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Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	
Hoping For:			

Week 51

Look For:

Health	Tasks This Week	Notes

Goals for this Week

Grateful For:

Week 52

Month and Year:

Date	Tasks Today/Appointments	Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			
Goals for this Year		Goals for this Month	

Hoping For:

