

# 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.

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.

### 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 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 laminate 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:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				



Goals for this Year	Goals for this Month

Hoping For:

**Week 1**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

Week 2

Month and Year:

Date	Tasks day/Appointments	To- Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			

Goals for this Year	Goals for this Month

Hoping For:

**Week 2**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

Week 3

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 3**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:



**Week 4**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 4**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

Week 5

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 5**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

**Week 6**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:



## Week 6

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

Week 7

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 7**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

**Week 8**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 8**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>

Goals for this Week


Grateful For:

Week 9

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				



Goals for this Year	Goals for this Month

Hoping For:

**Week 9**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

**Week 10**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 10**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>

<b>Goals for this Week</b>

Grateful For:

**Week 11**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
We				
Th				
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Su				

Goals for this Year	Goals for this Month

Hoping For:

## Week 11

Look For:

Health	Tasks This Week	Notes
Goals for this Week		

Grateful For:



**Week 12**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
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Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 12**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

**Week 13**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
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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:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
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Su				

Goals for this Year	Goals for this Month

Hoping For:



**Week 14**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

Week 15

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
Tu				
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Fr				
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Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 15**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>

Goals for this Week


Grateful For:

**Week 16**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
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Th				
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Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 16**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>

Goals for this Week

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Grateful For:

Week 17

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
Tu				
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Sa				
Su				



Goals for this Year	Goals for this Month

Hoping For:

**Week 17**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

**Week 18**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
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Tu				
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Goals for this Year	Goals for this Month

Hoping For:

**Week 18**

Look For:

Health	Tasks This Week	Notes
Goals for this Week		

Grateful For:

**Week 19**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
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Tu				
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Goals for this Year	Goals for this Month

Hoping For:

**Week 19**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>

Goals for this Week


Grateful For:



Week 20

Month and Year:

Date	Tasks day/Appointments	To- Financial	Communications
Mo			
Tu			
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Su			

Goals for this Year	Goals for this Month

Hoping For:

**Week 20**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>

<b>Goals for this Week</b>

Grateful For:

Week 21

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
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Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 21**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>

Goals for this Week

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Grateful For:

Week 22

Month and Year:

Date	Tasks day/Appointments	To- Financial	Communications
Mo			
Tu			
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Su			

Goals for this Year	Goals for this Month

Hoping For:



**Week 22**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

Week 23

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
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Goals for this Year	Goals for this Month

Hoping For:

**Week 23**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

Week 24

Month and Year:

Date	Tasks day/Appointments	To- Financial	Communications
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Goals for this Year	Goals for this Month

Hoping For:

**Week 24**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

Week 25

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
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Goals for this Year	Goals for this Month

Hoping For:

**Week 25**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

**Week 26**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
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Goals for this Year	Goals for this Month

Hoping For:

**Week 26**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

Week 27

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
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Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 27**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:



Week 28

Month and Year:

Date	Tasks day/Appointments	To- Financial	Communications
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Goals for this Year	Goals for this Month

Hoping For:



Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
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Su				

Goals for this Year	Goals for this Month

Hoping For:



**Week 30**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
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Goals for this Year	Goals for this Month

Hoping For:





**Week 31**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
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Su				

Goals for this Year	Goals for this Month

Hoping For:



Week 32

Month and Year:

Date	Tasks day/Appointments	To- Financial	Communications
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Su			

Goals for this Year	Goals for this Month

Hoping For:



Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
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Fr				
Sa				
Su				



Goals for this Year	Goals for this Month

Hoping For:

**Week 33**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>

Goals for this Week


Grateful For:

Week 34

Month and Year:

Date	Tasks day/Appointments	To- Financial	Communications
Mo			
Tu			
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Fr			
Sa			
Su			

Goals for this Year	Goals for this Month

Hoping For:



Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
Tu				
We				
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Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 35**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>

Goals for this Week


Grateful For:



**Week 36**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
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Su				

Goals for this Year	Goals for this Month

Hoping For:



Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
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Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:



**Week 38**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
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Su				

Goals for this Year	Goals for this Month

Hoping For:





Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:



**Week 40**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 40**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>

Goals for this Week


Grateful For:

**Week 41**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
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Su				



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 day/Appointments	To- Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			

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:

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:





Week 44

Month and Year:

Date	Tasks day/Appointments	To- Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			

Goals for this Year	Goals for this Month

Hoping For:

**Week 44**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

Week 45

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
Tu				
We				
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Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 45**

Look For:

Health	Tasks This Week	Notes
<b>Goals for this Week</b>		

Grateful For:

**Week 46**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:



**Week 46**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:

Week 47

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 47**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>

Goals for this Week

Grateful For:

Week 48

Month and Year:

Date	Tasks day/Appointments	To- Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			

Goals for this Year	Goals for this Month

Hoping For:

**Week 48**

Look For:

Health	Tasks This Week	Notes

Goals for this Week


Grateful For:

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				



Goals for this Year	Goals for this Month

Hoping For:

**Week 49**

Look For:

Health	Tasks This Week	Notes
Goals for this Week		

Grateful For:

**Week 50**

Month and Year:

<b>Date</b>	<b>Tasks day/Appointments</b>	<b>To-</b>	<b>Financial</b>	<b>Communications</b>
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:



Week 51

Month and Year:

Date	Tasks day/Appointments	To-	Financial	Communications
Mo				
Tu				
We				
Th				
Fr				
Sa				
Su				

Goals for this Year	Goals for this Month

Hoping For:

**Week 51**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>
<b>Goals for this Week</b>		

Grateful For:



Week 52

Month and Year:

Date	Tasks day/Appointments	To- Financial	Communications
Mo			
Tu			
We			
Th			
Fr			
Sa			
Su			

Goals for this Year	Goals for this Month

Hoping For:

**Week 52**

Look For:

<b>Health</b>	<b>Tasks This Week</b>	<b>Notes</b>

Goals for this Week


Grateful For: