January Paperwork Checklist

Tick each completed task and add your own steps on the spare lines.

Gather

- [ ] Collect mail
- [ ] Gather annual statements
- [ ] Find receipts
- [ ] List renewals
- [ ] _____
- [ ] _____

Review

- [ ] Check contact details
- [ ] Review insurance dates
- [ ] Check school forms
- [ ] Note upcoming appointments
- [ ] _____
- [ ] _____

File

- [ ] Label folders
- [ ] Shred duplicates
- [ ] File paid bills
- [ ] Back up scanned copies
- [ ] _____
- [ ] _____

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