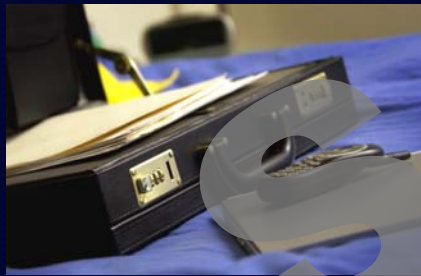




# Get It Together: Organize Your Financial Records



*Brought to you by  
[Insert CU name here]*



# Seminar objectives

## Learn:

- Benefits of getting organized
- Why some record-keeping systems fail
- How to develop efficient bill-pay system
- What records to keep, where, and how long
- How to take a home inventory
- What to have handy in case of natural disaster
- Where to go for help

Get It Together



# Benefits of getting organized

- Have more time, energy, space
- Find papers/receipts quickly
- Reduce/eliminate late fees
- Become clutter-free
- Find key documents in case of disaster
- Gain peace of mind



# Costs of *not* getting organized

- Zaps energy
- Wastes time
- Wastes money
- Increases stress
- Creates tax-time stress



# Why some record-keeping systems fail

- Not comprehensive
- Too complicated
- User isn't consistent

