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mail:
U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410; or

fax:
(833) 256-1665 or (202) 690-7442;

email:
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correo electrónico:
program.intake@usda.gov.

Esta institución ofrece igualdad de oportunidades.



**GET READY,
GET SET,
GET GOING:**

A GUIDE TO MONEY MANAGEMENT

Session 3 Organizing and Keeping Records

Facilitator Name & Position
Agency Name



GET **READY**, GET **SET**, GET **GOING**.

Our Mission



Helping people to improve their lives through an educational process that applies knowledge to critical issues, needs and opportunities.



MSU Extension



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www.mimoneyhealth.org



GET **READY**, GET **SET**, GET **GOING**.

Requirements

- Sign in each week
- Attend all classes



Ground Rules

**Is there anything
you wish to add?**

GET READY, GET SET, GET GOING.

Participate and contribute.

Be respectful.

Be responsible.

Be open.

Be flexible.

Help us stay on time.

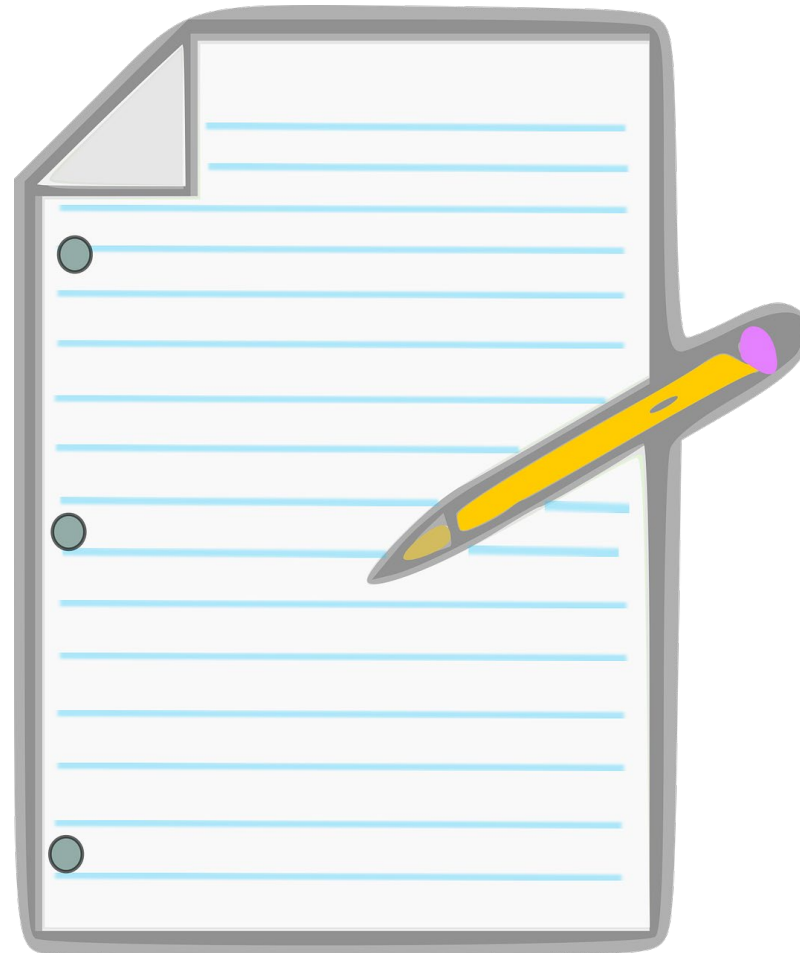
Have fun.

Keep the end in mind.

Turn off cell phones.

GET **READY**, GET **SET**, GET **GOING**.

Handouts



GET **READY**, GET **SET**, GET **GOING**.

Money Management Sessions

- Week 1 – What's My Future
- Week 2 – Making Good Money Decisions
- **Week 3 – Organizing and Keeping Records**
- Week 4 – Planning to Save
- Week 5 – Saving for the Future
- Week 6 – Making a Spending Plan
- Week 7 – Managing a Spending Plan

GET **READY**, GET **SET**, GET **GOING**.

Money Management Sessions

- Week 8 – Protecting My Money
- Week 9 – Income and Taxes
- Week 10 – Paying Bills
- Week 11 – Understanding Your Credit
- Week 12 – Controlling Debt



My Plan Check-in

Write a SMART goal based on
your financial dreams



GET **READY**, GET **SET**, GET **GOING**.

Objectives

- Determine ways to cut clutter
- Determine ways to be organized
- Identify a filing system

GET **READY**, GET **SET**, GET **GOING**.

Organizing

- Decide together what is important
- Choose a place to keep and store records
- Continue to track income and expenses

GET **READY**, GET **SET**, GET **GOING**.

Activity 1

Organize Personal Papers



Finding Important Papers

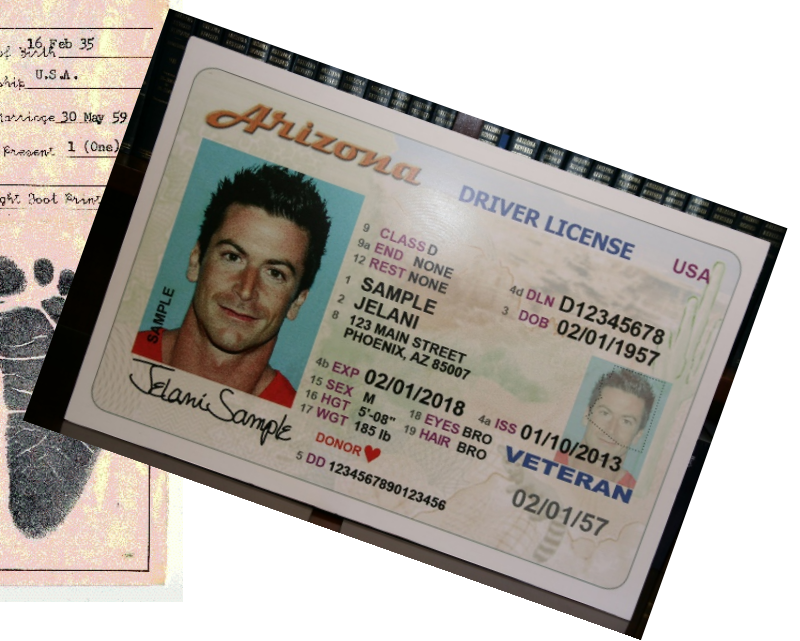
GET **READY**, GET **SET**, GET **GOING**.



STATISTICAL RECORD

Bull Name <u>JOHN DENISON HANSEN</u> Age <u>25</u>		Bull Maiden Name <u>VIRGINIA MATHILDA BAKER</u>	
Residence <u>HQ & HQ OO USASAPAC APO 343</u>		Residence <u>P-42 Fuchino, Japan</u>	
Description of Military Rank <u>SP4</u>		Description <u>House-wife</u>	
Birthplace <u>Kansas City, Missouri</u> Date of Birth <u>5 Aug 35</u>		Birthplace <u>Lakewood, Ohio</u> Date of Birth <u>16 Feb 35</u>	
Race <u>Cau</u> Citizenship <u>U.S.A.</u>		Race <u>Cau</u> Citizenship <u>U.S.A.</u>	
Place of Marriage <u>Lakewood, Ohio</u>		Date of Marriage <u>30 May 59</u>	
Number of Previous Children by This Marriage <u>0 (None)</u>		Number of Children Living, Including Present <u>1 (One)</u>	

Birthweight <u>9</u> Lbs. <u>8 1/2</u> Ozs.	Left Foot Print
Length <u>1</u> Ft. <u>10</u> In.	Right Foot Print
Sex <u>Male</u>	
Stillborn <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Records American Consulate State _____	
Location of Consulate _____	





Activity 2

Keep Important Papers

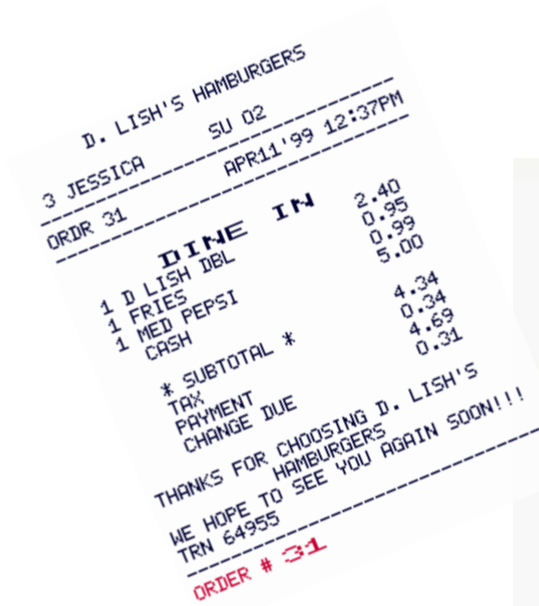
**Social Security cards, birth certificates,
etc.**

Activity: Keep or Toss



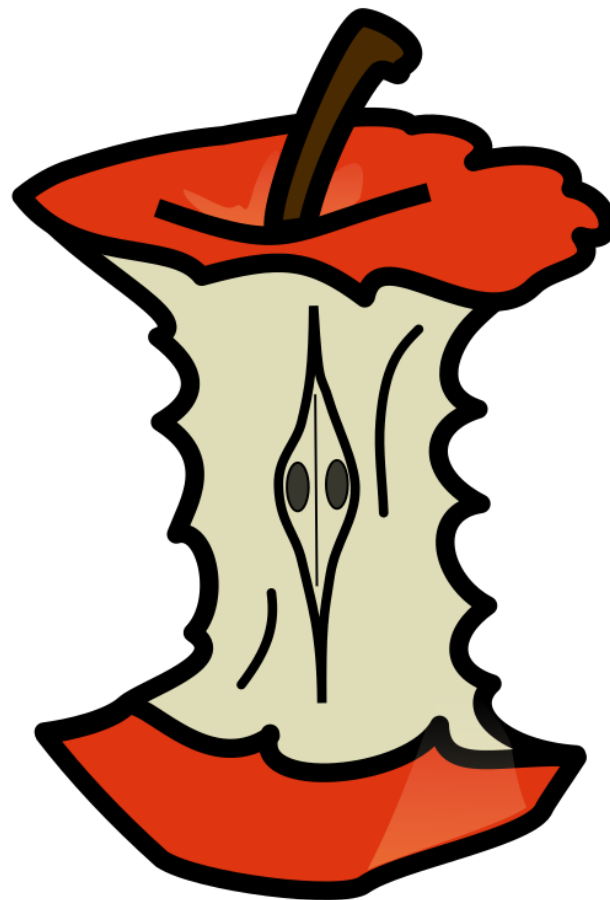
Keep or Toss?

GET **READY**, GET **SET**, GET **GOING**.



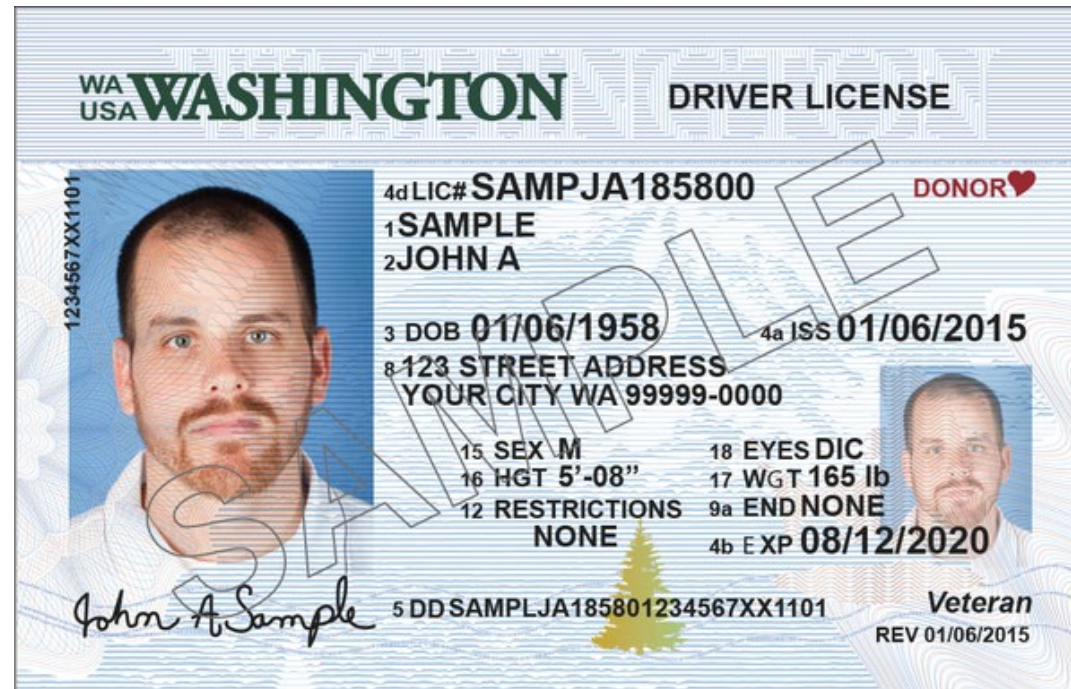
Keep or Toss?

GET **READY**, GET **SET**, GET **GOING**.



Keep or Toss?

GET **READY**, GET **SET**, GET **GOING**.



Keep or Toss?

GET **READY**, GET **SET**, GET **GOING**.

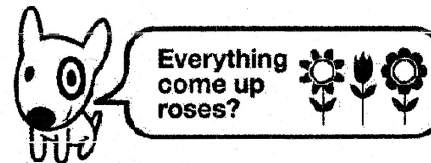


OAHU HONOLULU ALA MOANA
05/12/2018 02:05 PM EXPIRES 08/10/18



GROCERY			
267008011	BANANA	FT	\$0.39
		SUBTOTAL	\$0.39
T = HI TAX	4.7120% on	\$0.39	\$0.02
		TOTAL	\$0.41
	CASH PAYMENT		\$0.41

REC#2-8132-2870-0169-3511-3 VCD#759-280-869



Help make your Target Run better.
Take a 2 minute survey about today's trip:

informtarget.com
User ID: 7186 7713 0983
Password: 064 887

CUÉNTENOS EN ESPAÑOL

Please take this survey within 7 days.



Keep or Toss?

GET **READY**, GET **SET**, GET **GOING**.



Keep or Toss?

GET **READY**, GET **SET**, GET **GOING**.



GET **READY**, GET **SET**, GET **GOING**.

Keep or Toss?



GET **READY**, GET **SET**, GET **GOING**.

Keep or Toss?



GET **READY**, GET **SET**, GET **GOING**.

Keep or Toss?



GET **READY**, GET **SET**, GET **GOING**.

Keep or Toss?



GET **READY**, GET **SET**, GET **GOING**.

Family and Children's Records

Family and Children's Records Needed:	Name		
	Car/Truck Records		
	Housing Records		
	Birth & Death Certificates		
	Marriage License		
	Divorce/Custody Records		
	Green Card Records		
	HS Diploma/GED		
	Life Insurance		
	Car/Truck Insurance		
	Homeowner's or Renter's Insurance		
	Tax Papers		
	Health and Medical Records		
	Employment Records		
	Social Security Records		
	EBT Records		
	School Transcripts		
	School Principal & Teachers Names		

GET **READY**, GET **SET**, GET **GOING**.

Label File Folders

File Folder Labels Choose the ones you will use.



Financial records: Income

Financial records: Expenses/Bills To Pay : 1 – 7 (week one)

Financial records: To Pay: 8 – 14 (week two)

Financial records: To Pay: 15 – 21 (week three)

Financial records: To Pay: 22 – 31 (week four)

Financial records: PAID – Housing

Financial records: PAID – Medical

Financial records: PAID – Utilities

Financial records: PAID – Car or truck

Financial records: PAID – Credit

Financial records: Coupons

Financial records: Account numbers

Family records: Car/truck

Family records: Housing

Family records: Birth and death certificates

Filing System

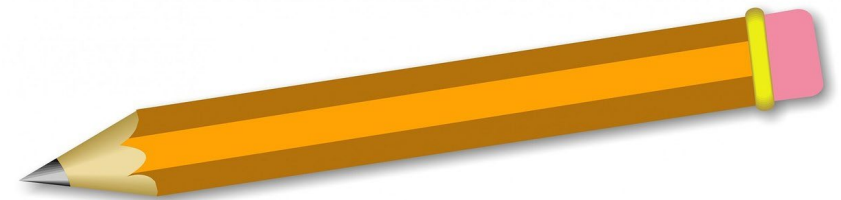
- Where
- Who
- Pay bills on time
- Receipts in file folders

GET **READY**, GET **SET**, GET **GOING**.



GET **READY**, GET **SET**, GET **GOING**.

Household Inventory



Activity 4

Cutting the Clutter

GET **READY**, GET **SET**, GET **GOING**.



GET **READY**, GET **SET**, GET **GOING**.

Organize Your Home

Be a guest—what do you see?

- Where does it grow?
- Priorities?
- Who?
- Have a system—room by room



Ways to Cut Clutter

GET **READY**, GET **SET**, GET **GOING**.



Cutting the Clutter!

Reasons it develops	Ways to stop feeding the clutter
Kitchen:	
Living Areas:	
Bathrooms:	

GET **READY**, GET **SET**, GET **GOING**.

SMART Goals

What is a **S.M.A.R.T.** goal?

Specific

Measureable

Attainable

Realistic

Time Bound

GET **READY**, GET **SET**, GET **GOING**.

SMART Goals...Ask Yourself

Is this goal specific?

Are the results easily measurable?

Attainable? Realistic?

Does my goal include a completion date?

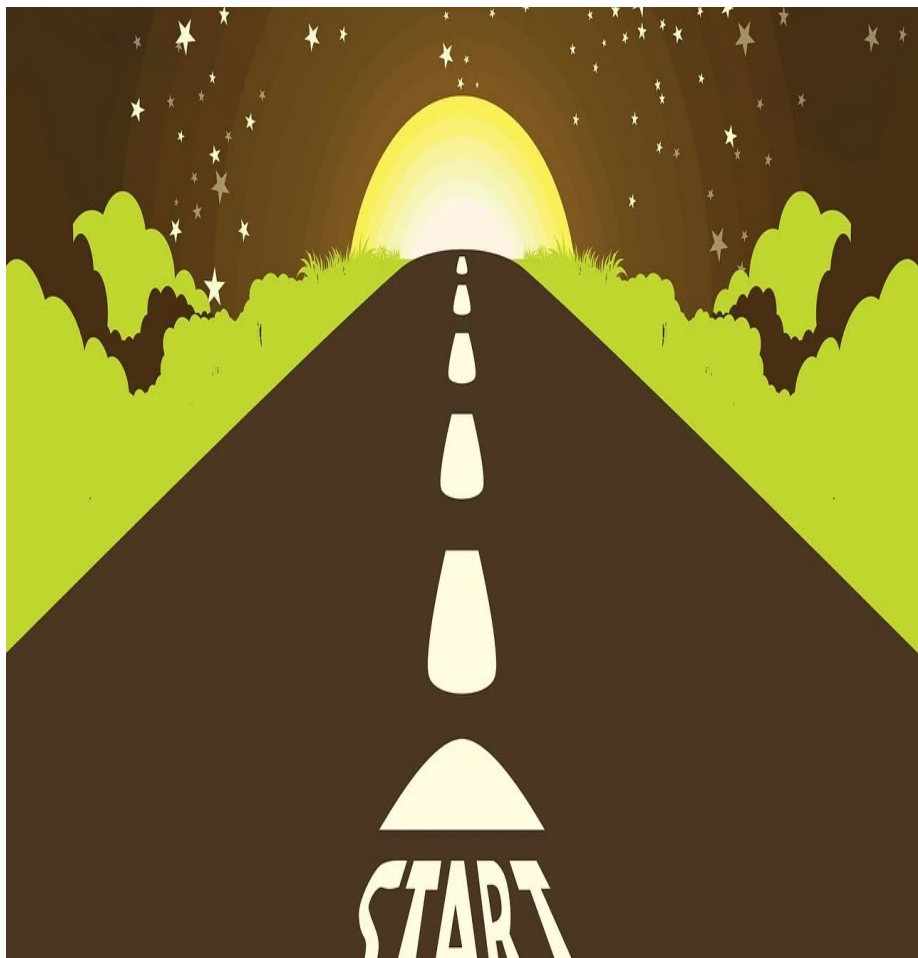
If you answer any with no, you have more work to do!

GET **READY**, GET **SET**, GET **GOING**.

Discussion Questions



Ready for Change? GET **READY**, GET **SET**, GET **GOING**.



Make a plan for **Putting goals into action**

1. Pick a SMART goal that you want to achieve and break it up into steps.
2. Write down each step, the resources you'll need to achieve it, and the due date for completing it.
3. Pick a friend or family member to tell about your goal and check in with them on a regular basis. This will help you keep yourself accountable.

Select a SMART goal you want to achieve.

My SMART goal is...

Make an action plan for your SMART goal.

Steps List one specific step in each box for achieving your goal	Resources I need This can be things like tools, information, transportation, assistance, or money	Date to complete step	Who will I check in with? And how often will I check in?
1.			
2.			

GET **READY**, GET **SET**, GET **GOING**.

Wrap Up



My Plan

GET **READY**, GET **SET**, GET **GOING**.

aka...assignment

1. Organize personal papers
2. Find missing important papers
3. Use a recordkeeping system
4. Write a SMART goal





GET READY, GET SET, GET GOING:

A GUIDE TO MONEY MANAGEMENT

Next class: *Planning to Save*



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Acknowledgments

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