

January

- Budget Review
- Family Bank Account
- Mortgage Bank Account
- Motorcycle Bank Account
- The Mission Bank Account
- Travel Bank Account
- Work Bank Account
- Credit Cards
- Credit Report Request
- ID Cards, Accounts, Subscriptions (Add, Update, Delete Expiration and Renewal Dates)
- Account and Subscription Closing Letter Creation and Mailing

February

- Vehicle Insurance
 - Vehicle Safety Check
 - Motorcycle Insurance
 - Car Insurance
 - Boat Insurance
 - Camper Insurance
- Homeowners Insurance
 - Home Inventory Checklist
- Home Personal Asset Inventory (What your family should know)
 - Sump Pump Check
 - Smoke Detector Check
 - Fire Extinguisher Check
 - Furnace / AC Check

March

- Pets Microchip and Registration Information
- Pets Paw Plan Renewal
- Emergency Contacts

April

- Wesleyan DBMD Questionnaire
- Wesleyan Discipline
- Nehemiah Award Write-up and Submission

May

- Work Life Insurance
- Fire Department Life Insurance
- Life Annuity

June

- TSP (Work)
- TSP (Personal)
- Roth Plan
- Investment Plan

July

- Standard Operating Procedures
- By-Laws
- Grants and Scholarship Applications

August

- Non-Disclosure Agreement (SF312/DD1847-1)
- SCI Agreement (DD4414)
- Questionnaire for National Security Positions (SF 86)
- Psychological Evaluation
- Background Check

September

- Business Property Insurance
- Business Property Inventory
- Business Continuity Plan
- Disaster Recovery Plan

October

- DD93 Record of Emergency Data
- Medical / Physical Information
- Endowments
- Living Will
- Advance Directives
- Burial Directives
- Executor
- POA
- Will
- Executor of State
- Trust (Check for a non-relative of the next generation)
- Update Security Box Documents and Key location
 - Power of Attorney
 - Directives
 - Wills
 - Retirement Fund Statements and Beneficiaries
 - Social Security Statement, Accounts
 - Life Insurance Policies
 - Executor

November

- Insurance
 - Medical
 - Dental
 - Vision
 - Long-Term
 - Health-Savings

December

- Soldier Readiness Program (SRP)
- Human Resource Policies
- Emergency Alert Notifications
- Disaster Personnel Accountability and Assessment System Information
- Resume (Long and Short), Biography Letter