

# Yearly Review Checklist

From [jorisroovers.com/posts/yearly-life-reviews](https://jorisroovers.com/posts/yearly-life-reviews)

Version: 1.0

## Paperwork and Administration

### Finances

- Update Finance spreadsheets
  - Cost of Living*
  - Income of the Year*
  - Large Expenses of the Year*
  - Total Net Worth*
  - Pension Deduction Calculation*
- Download payslips
- Review Donations
- Review Mortgage
- Review Subscriptions

### Insurance

Review all insurances

- Health
- Home
  - Take pictures of furniture, electronics, etc as proof for insurance
- Home-loan/Mortgage
- Legal
- Car
- Liability

- Travel

## General Administration

- Review *Emergency Information* paper document
- Review *Emergency Contact Information* wallet cards
- Scan any piled up paperwork (see [Going Paperless](#))
- Review paper document Expanding Organizer (see [Going Paperless](#))
- Cleanup filing cabinet (see [Going Paperless](#))

## Digital Identity

### Organization

Cleanup files/structure.

- Lastpass
- Google Drive
  - Create folders for next year in Google Drive
- Spotify
- Notion
- Registered Domain names

### Backups

Happens every quarter or so, including once as part of end-of-year review.

- Bookmarks
- Lastpass
- [Google Takeout](#)
  - Google Drive
  - Gmail
  - Google Photos
- SimpleMind

- Notion
- Casa
- Websites
- Apple Health Data

## Security

For all family members:

- Google Security Checkout
  - Google Advanced Security
  - Privacy Checkup
  - Inactive Account Manager
- Lastpass Security Challenge

## House Cleanup

- Buy Supplies
  - Pantry/Food
  - Bathroom
  - Medical
  - Kitchen
  - Cleaning
  - Laundry
  - Office
  - Misc (batteries, tape, etc)
- Clean up
  - Kitchen cupboards
  - Clothing closet
    - Donate old clothes
  - Attic

- Pantry
- Garden
- Gutters
- Night Stand
- Bathroom Cupboards
- Fix any broken things around the house
- Test out smoke and gas detectors
- Clean Dishwasher
- Clean Washing Machine
- Vacuum and turn-over mattresses

## Travel

- Clean and water-proof hiking boots
- Add back-up handkerchiefs to coats, backpacks, travel bags
- Review car glove box contents
- Clean car

## Reflection

Document the past, plan for the future

- Technohistory (devices owned, thoughts on tech - I'll blog about this in the future)
- Document Life events: big personal and world events, media consumed
- Past Travels
- Last year's goal evaluation
- MindMap last year
- Determine goals for next year

## Health

- Physical health self-evaluation
- Consider getting blood tests/physical evaluation
- Take action on any *overdue* ailments/concerns
- Mental/Emotional health reflection

## Relationships

- Plan for quality time with immediate family
- Review and plan time with close friends and family

## Work

- Review conferences for upcoming year
- Review internal sign-up trainings
- Review internal on-demand training and subscription services
- Take care of open expense reports/holiday planning/etc

## Misc

- Food prep: batch prepping food and deep freezing
- Print/order new family pictures for around the house