D*I*Y Planner v3.0 Core Package (A5)

Welcome to the **D*I*Y Planner** system, developed by Douglas Johnston of DIYPlanner.com. This series of free do-it-yourself, printable forms covers life management, calendars, project planning, notetaking, health, finance, and creative uses like writing, storyboards, and web design. Besides the nearly 200 printable templates, it also includes a cover kit, a detailed handbook brimming with advice, and a beginner's guide to setting up your own customised planner system. With some basic supplies and a little elbow grease, you can create an ideal low-cost kit that meets almost every need.

This the **D*I*Y Planner v3 Core Package**, the main file for the system, containing scores of forms for life and project management, as well as a number of generic templates and various odds and ends. Note that most templates include variations for both odd and even pages, allowing you to print and configure your own personalised system however you like.

The most recent version of this package, along with the rest of the printable template kits, can always be found at:
http://www.diyplanner.com/templates/official/classic

The DIYPlanner.com site also contains handbooks, how-to guides, documents and numerous articles that can help you make the most of your planner. Please visit the site home page or the documents section to get started.

Legal Rights & Disclaimers

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Personal Profile

Contact Information

NAME		
Address		
Telephone	Work	Fax
	Mobile	Home
	Other	
Email		
Messenger		
Website		

Emergency Information

NOTIFY		Relationship
Address		
Telephone		
Email		

Medical Issues (Allergies, medications, etc.)	
Blood Type/Issues	
Health Plan	

D*I*Y planner

D*I*Y Planner Kit ©2004-2006 Douglas Johnston

This planner system, including templates, documentation and more, is available free for personal use at: http://www.DIYPlanner.com

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Important Numbers

Medical & Emergency

Hospital		
Doctor		
Poison Control		
Dentist		
Veterinarian		
Insurance		Account
Police		
Fire Department		

Home & Automotive

Landlord		
Garage		
Insurance		Account
Services	Plumber	Electrician
	Carpenter	

Financial *

Accountant		
Accounts (Saving, Chequing, Credit Cards)		Account
		Account
		Account
		Account

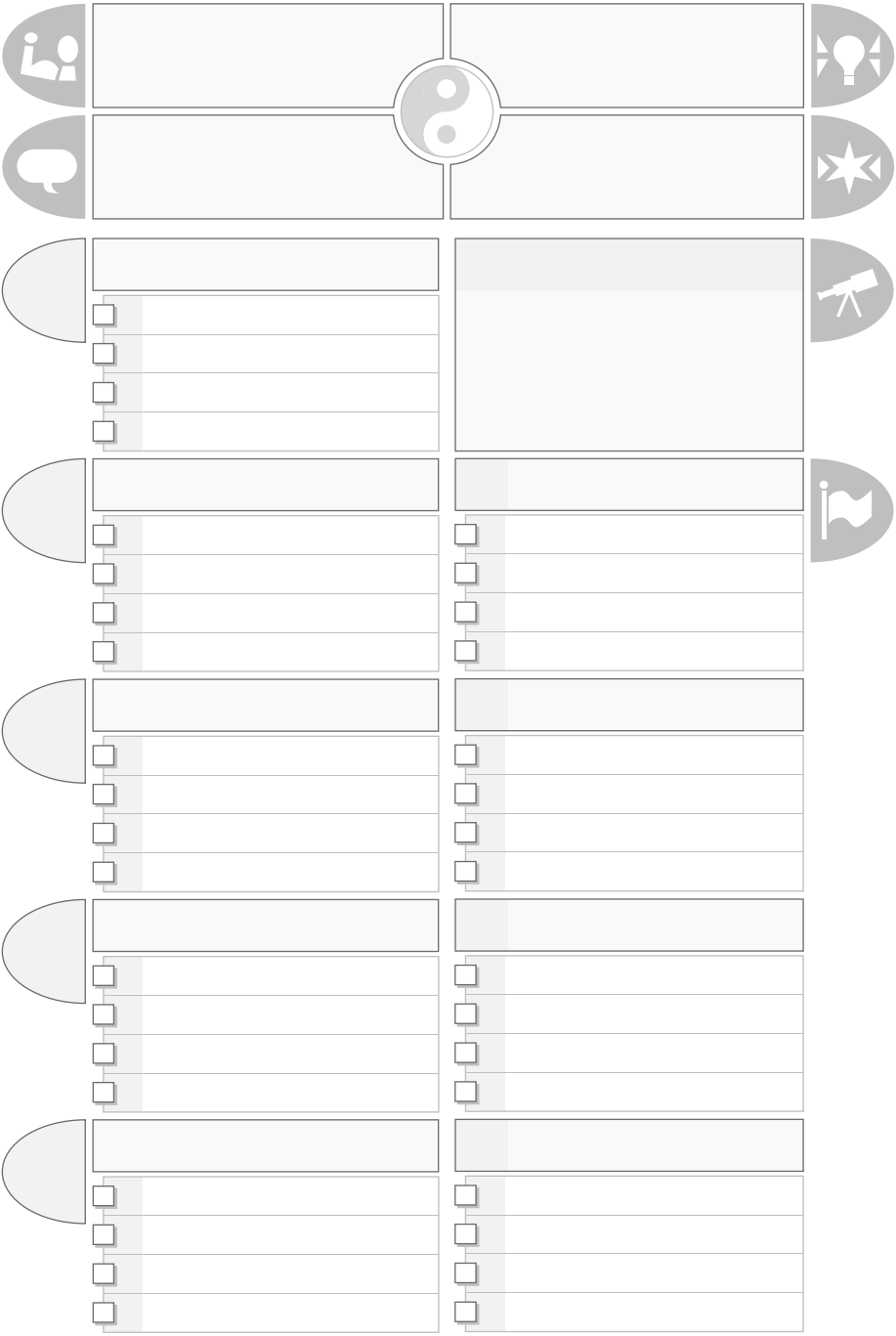
Other

* Remember that all financial information should be safeguarded in order to protect yourself from theft.

Important Numbers

Harmony

Harmony



Combined Actions

Actions

Waiting For

Notes

Combined Actions

Actions

Waiting For

Notes

Actions

Actions

Actions

Due Date

PR Note

Due Date

PR Note

Due Date

PR Note

Due Date

PR Note

Due Date

PR Note

Due Date

PR Note

Due Date

PR Note

Due Date

PR Note

Due Date

PR Note

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Actions

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PR Note

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PR Note

Due Date

PR Note

Actions Quadrant

Actions Quadrant

Waiting For

	Task	Date	Due
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Waiting For

	Task	Date	Due
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Waiting For

			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date

Waiting For

			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
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			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date
			Due Date
PR	Note	Delegated To	Delegated Date

Agenda

Person / Meeting

Item	Date/Time

Notes / Outcomes

Agenda

Person / Meeting

Item	Date/Time

Notes / Outcomes

Agendas

Person / Meeting

Item	Date/Time

Person / Meeting

Item	Date/Time

Agendas

Person / Meeting

Item	Date/Time

Person / Meeting

Item	Date/Time

Potentials Quicklist

- [ ]
  Reason
- [ ]
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Potentials Quicklist

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  Reason
- [ ]
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  Reason

Potential Projects

Idea

Description	
Notes	

Idea

Description	
Notes	

Potential Projects

Idea

Description	
Notes	

Idea

Description	
Notes	

Goal Planning

Goal

Mission

Wildly Successful If . . .

Step	Target

Outcomes

Goal Planning

Goal

Mission

Wildly Successful If . . .

Step	Target

Outcomes

Objectives

Objective

Description		Target Date
Benefits		
Challenges		

Step	Target

Outcome	

Objective

Description		Target Date
Benefits		
Challenges		

Step	Target

Outcome	

Objectives

Objective

Description		Target Date
		☐
Benefits		
Challenges		

	Step	Target
☐		
☐		
☐		
☐		
☐		

Outcome	

Objective

Description		Target Date
		☐
Benefits		
Challenges		

	Step	Target
☐		
☐		
☐		
☐		
☐		

Outcome	

Priority Matrix

Title

Date

URGENCY

IMPORTANCE

Urgent / Important	Not Urgent / Important
Urgent / Not Important	Not Urgent / Not Important

Priority Matrix

Title

Date

URGENCY

IMPORTANCE

Urgent / Important	Not Urgent / Important
Urgent / Not Important	Not Urgent / Not Important

To Do

☐		Due Date
	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To
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	PR ☐	Delegated To
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	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To

To Do

☐		Due Date
	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To
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	PR ☐	Delegated To
☐		Due Date
	PR ☐	Delegated To

Project Details A

Title

Client			
Start Date		Target Date	

Description / Objectives

Basic Resources

☐		☐	
☐		☐	
☐		☐	
☐		☐	
☐		☐	
☐		☐	
☐		☐	

Notes

Project Details A

Title

Client			
Start Date		Target Date	

Description / Objectives

Basic Resources

☐		☐	
☐		☐	
☐		☐	
☐		☐	
☐		☐	
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☐		☐	

Notes

Project Details B

Title

Budget

People

Locations

Materials

Project Details B

Title

Budget

People

Locations

Materials

Project Outline A

Title

Description	
Objective	

Challenges	Solutions

Task	Target

Project Outline A

Title

Description	
Objective	

Challenges	Solutions

Task	Target

Project Outline B

Title

Task	Target

Project Outline B

Title

	Task	Target

Project Notes

Title

Project Notes

Title

Project Tracker

Project

Objective

Dates

Target Date

Completed Date

Notes & Issues

Item	Action	Due	Del	Comp	Impact

External Impact	
Total Impact	

ITEM = Item or Reference Number ACTION = Project Action or Item
DUE = Set Due Date DEL = Delegate Name and/or Date COMP = Completion Date
IMPACT = Impact of Completion Date(s) on project, in days

Project Tracker

Project

Objective

Dates

Target Date

Completed Date

Notes & Issues

Item	Action	Due	Del	Comp	Impact

External Impact	
Total Impact	

ITEM = Item or Reference Number ACTION = Project Action or Item
DUE = Set Due Date DEL = Delegate Name and/or Date COMP = Completion Date
IMPACT = Impact of Completion Date(s) on project, in days

Job Tracker

Client	

Dates			
Rate		Time On-Site	
		Time Off-Site	
Expenses		Travel Time	
		Billable Time	
Notes			

Specifics

Job Tracker

Client	

Dates			
Rate		Time On-Site	
		Time Off-Site	
Expenses		Travel Time	
		Billable Time	
Notes			

Specifics

Docket Time

Docket	Duration	Date	Time	Task

Docket Time

Docket	Duration	Date	Time	Task

Weekly Tracker

Monday												
Tuesday												
Wednesday												
Thursday												
Friday												
Saturday												
Sunday												

Monday												
Tuesday												
Wednesday												
Thursday												
Friday												
Saturday												
Sunday												

Weekly Tracker

Monday												
Tuesday												
Wednesday												
Thursday												
Friday												
Saturday												
Sunday												

Monday												
Tuesday												
Wednesday												
Thursday												
Friday												
Saturday												
Sunday												

Crossroads

Title

Date

Destination

Four Paths to Reach the Destination

1

2

3

4

Looking Back

Crossroads

Title

Date

Destination

Four Paths to Reach the Destination

1

2

3

4

Looking Back

Contacts

Name

Address		Phone	
		Fax	
		Mobile	
Email			

Name

Address		Phone	
		Fax	
		Mobile	
Email			

Name

Address		Phone	
		Fax	
		Mobile	
Email			

Name

Address		Phone	
		Fax	
		Mobile	
Email			

Name

Address		Phone	
		Fax	
		Mobile	
Email			

Contacts

Name

Address		Phone	
		Fax	
		Mobile	
Email			

Name

Address		Phone	
		Fax	
		Mobile	
Email			

Name

Address		Phone	
		Fax	
		Mobile	
Email			

Name

Address		Phone	
		Fax	
		Mobile	
Email			

Name

Address		Phone	
		Fax	
		Mobile	
Email			

Contact Log A

Name

Company			Account
Address		Work	
		Home	
		Fax	
		Mobile	
Email			
Website			
Hours			
Referred By			

Date	Discussed	Follow-Up	$/Time

Contact Log A

Name

Company			Account
Address		Work	
		Home	
		Fax	
		Mobile	
Email			
Website			
Hours			
Referred By			

Date	Discussed	Follow-Up	$/Time

Contact Log B

Name

Company

Date	Discussed	Follow-Up	$/Time

Contact Log B

Name

Company

Date	Discussed	Follow-Up	$/Time

Sources

Name

Contact			Account
Address		Phone	
		Fax	
		Email	
Hours		Web	

Name

Contact			Account
Address		Phone	
		Fax	
		Email	
Hours		Web	

Name

Contact			Account
Address		Phone	
		Fax	
		Email	
Hours		Web	

Name

Contact			Account
Address		Phone	
		Fax	
		Email	
Hours		Web	

Sources

Name

Contact			Account
Address		Phone	
		Fax	
		Email	
Hours		Web	

Name

Contact			Account
Address		Phone	
		Fax	
		Email	
Hours		Web	

Name

Contact			Account
Address		Phone	
		Fax	
		Email	
Hours		Web	

Name

Contact			Account
Address		Phone	
		Fax	
		Email	
Hours		Web	

Matrix

Matrix

Matrix

Matrix

Checklist

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Checklist

Trip Diary

Date	Destination	Starting	Ending	Mileage

TOTAL

Trip Diary

Date	Destination	Starting	Ending	Mileage

TOTAL

Auto Maintenance Log

Vehicle Information

Make		Year	
Model		Colour	
VIN		License	
Insurance			

Date	Mileage	Services & Location	Cost

Warranty Details

Auto Maintenance Log

Vehicle Information

Make		Year	
Model		Colour	
VIN		License	
Insurance			

Date	Mileage	Services & Location	Cost

Warranty Details

To Buy

☐	Store	Cost
☐	Store	Cost
☐	Store	Cost
☐	Store	Cost
☐	Store	Cost
☐	Store	Cost
☐	Store	Cost
☐	Store	Cost
☐	Store	Cost
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☐	Store	Cost

Notes

TOTAL

To Buy

	Store	Cost
☐		
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Notes

TOTAL

Shopping

Shopping

Finances

Date	Item	$ ↓ ↑ ✓	Amount

$ Cash ↓ Debit ↑ Credit ✓ Check

TOTAL

Finances

Date	Item	$ ↓ ↑ ✓	Amount

$ Cash ↓ Debit ↑ Credit ✓ Check

TOTAL

Check Register

No.	Date	Transaction Description	Cat.	Credits	Debits	Balance	Rec.
							☐
							☐
							☐
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							☐

Check Register

No.	Date	Transaction Description	Cat.	Credits	Debits	Balance	Rec.
							☐
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							☐

Equipment

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
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Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Equipment

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

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Serial	Cost	☐ New ☐ Used	Insured

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Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Make / Model			
Serial	Cost	☐ New ☐ Used	Insured

Job Search A

Position

Ref. #

Company	Deadline
Source	
Contact	

Description

Requisites

PR

Strengths

PR

Obstacles

PR

Date Applied	Materials Sent

Job Search A

Position

Ref. #

Company	Deadline
Source	
Contact	

Description

Requisites

PR

Strengths

PR

Obstacles

PR

Date Applied	Materials Sent

Job Search B

Contact Log

Title	
Company	
Contact per Ad	

Date / Time	Person / Contact	Follow-up Date
	Outcome	Me ☐ Them ☐
Note Ref.		

Date / Time	Person / Contact	Follow-up Date
	Outcome	Me ☐ Them ☐
Note Ref.		

Date / Time	Person / Contact	Follow-up Date
	Outcome	Me ☐ Them ☐
Note Ref.		

Date / Time	Person / Contact	Follow-up Date
	Outcome	Me ☐ Them ☐
Note Ref.		

Date / Time	Person / Contact	Follow-up Date
	Outcome	Me ☐ Them ☐
Note Ref.		

Job Search B

Contact Log

Title	
Company	
Contact per Ad	

Date / Time	Person / Contact	Follow-up Date
	Outcome	Me ☐ Them ☐
Note Ref.		

Date / Time	Person / Contact	Follow-up Date
	Outcome	Me ☐ Them ☐
Note Ref.		

Date / Time	Person / Contact	Follow-up Date
	Outcome	Me ☐ Them ☐
Note Ref.		

Date / Time	Person / Contact	Follow-up Date
	Outcome	Me ☐ Them ☐
Note Ref.		

Date / Time	Person / Contact	Follow-up Date
	Outcome	Me ☐ Them ☐
Note Ref.		