



30-Day Plan

TO TRACK YOUR
PERSONAL FINANCES



See how easy it is to take
control of your finances.



Do you know where your money is going?

With the current state of the economy, it's more important than ever to get your finances in order. This means knowing how much money you have and how and where you're spending it. Most people know how much they have; however, the majority does not know where they're spending it. And if you don't know where your money is going, then you're not in control of it.

Take back control. The first and most critical step is to know what you spend. Tallying up your spending can seem daunting, but it doesn't have to be. With scanners and digital filing solutions from The Neat™ Company, you can follow this simple and fool-proof plan to get a snapshot of your spending in just 30 days!

Step 1

Scan your receipts. Every budget and financial plan begins with understanding where your money goes on a day-to-day basis. **Save the receipts from each and every purchase that you and your family make over the next month.** As you collect receipts, scan them into NeatWorks™. Our patented technology reads information from receipts, such as vendor, date, sales tax and amount. Assign an expense category to each receipt such as “fuel”, “meals” or “transportation” and digitally file the expense to a folder (for example, by expense month – “November 2009”). Additionally, a digital image of the receipt is stored in the software application, so you can recycle the receipt immediately after scanning.

Note: If you already use financial management or accounting software such as Quicken® and QuickBooks® (or you aspire to), data from NeatWorks can be easily exported to these applications.

30-Day Plan



Step 2



Organize your paper. As the monthly bills or statements for mortgage payments, car payments, utilities, insurance and more, arrive in the mail, scan them into NeatWorks™. This accomplishes two tasks. First, it helps you tally up your monthly expenses. Second, it organizes and stores your bills and documents in one central location.

Often times, our bills, financial statements and other important documents live in various drawers or cabinets throughout the house, and locating them can be a challenge. However, when they're scanned into NeatWorks, they're organized into digital folders and searching for what you need can be accomplished in seconds, rather than minutes or hours.

Step 3

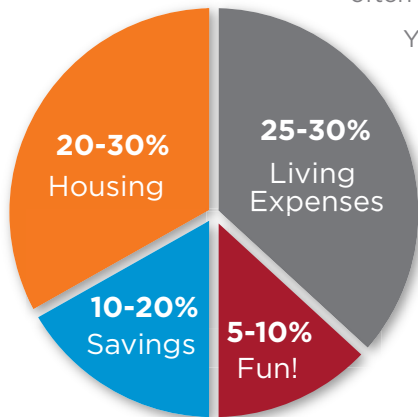
Run reports. On Day 30, run reports in NeatWorks to see where you spent your money. You can run reports by category, payment type, vendor, client, project or by payment class. You'll likely be surprised, and just might gasp, when you see the breakdown of how you spent your money over the past 30 days.

You'll learn things like:

- How much you're spending on food
- How much you're spending on utilities
- How much you're spending on things you don't need

And that's it!

With just a few minutes a day and very little effort, you've started to take control of your finances. Now that you know where your money is going, you can make the adjustments necessary to accomplish your short and long term goals, often with very minor changes.



You can put a budget together that will help you spend money where you want and need to. Spending percentages by category will vary from household to household, however, the chart on the left is a general guideline.

Anything left over can go towards additional savings or paying off debt.

Remember - learning what you spend is step one, but it's an ongoing process. Continue to use NeatWorks™ to scan in your expenses, bills and financial statements on a regular basis. Over time, you'll gain perspective on your spending habits and will find it easier to stick to your goals. Also, there are many online and professional resources available to help you plan your budget and meet longer term goals, such as saving for retirement, so take control and take the next step!

Household Spending

Take the next step.

Learning what you spend is step one, but it's an ongoing process. Continue to scan in your expenses, bills and financial statements on a regular basis. Over time, you'll gain perspective on your spending habits and will find it easier to achieve your short and long term financial goals.

It's easy to get started. With just a few minutes a day and very little effort, you can take control of your finances. And The Neat Company is making it easier than ever to get started!



neatco.com/take-control

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