



PAM BURKE COACHING
OPENING UP POSSIBILITIES

PART III - USING TYPE AS A LENS TO GET RESULTS WITH MORE EASE

Your 4 letter self estimate type combination is:

1. What do you want to get done? Set aside 30 minutes to focus on some things you'd like to get done. Make a note of 3 things from this list you'd like to practice using type strategies to get results with more ease.

1. _____
2. _____
3. _____

*Pick one task/goal from the three listed above. For anyone with the middle two preferences of **ST or NT**, try using your logic to decide on your focus. Out of the three above, what is a top priority or what would you like to tackle first? Do you want to try the easiest or most difficult first? For anyone with the middle two preferences of **NF or SF**, write the three items on separate pieces of paper, fold them up, mix them around and pick one randomly to be your focus. Or, ask yourself which task feels like you want to start with or will impact others in a positive way when you accomplish it.*

2. How will you monitor or measure your progress? *For anyone with the last two type preferences of **TJ or FJ**, make a plan about how you will do this. For **TP or FP**, think about all of the possible ways you can measure or monitor your progress and then decide on which one makes the most sense or feels right to you.*

3. Do you have everything you need to get this project or task started? *For anyone with the first two preferences of **ES or IS**, take an inventory of everything practical you will need. For an **ES**, talking this through with someone may be helpful. For an **IS**, spending some quiet time alone running through this practical inventory may help. If you have an **EN or IN** preference, play around with different ideas and possibilities of things you will need. For an **EN**, telling someone about your project and ideas you have about what you'll need may be helpful. For an **IN**, spending some quiet time alone making a mind map or vision board of things you need may be more appealing.*

4. WHY is getting this task or project completed important to you? *How will getting this done make a difference to you or someone else? For anyone with the middle two preferences of **ST or NT**, think about why this makes logical sense to tackle this project before you get started. For anyone with the middle two preferences of **NF or SF**, ask yourself how you will feel once this task or project is done or how this will benefit you or others once this is complete.*

5. How much time do you need to get this completed? *For anyone with the last preferences J, ask yourself if you want one deadline or mini-deadlines and write down or schedule them electronically. For anyone with the last preference P, set mini-deadlines and put them in your calendar. Allow yourself flexibility and fun as you approach each deadline and use the “last minute” energy as you approach each deadline to help you move your project forward. Then, reward yourself with something small each time you do something according to your plan.*

6. Break down all of the above into small steps:

Here is an example answering all of the questions from Part 3: 1. Task - getting 2021 taxes completed; 2. Monitor or measure by gathering all tax receipts and review them each month (Jan., Feb., March); 3. What do I need to get started? A checklist to use each year outlining all parts needed to complete my taxes 4. Why is this important - because I don't want to pay the IRS penalties if I miss the April 15th deadline 5. How long will I need? Approximately 3 months; 6. Break down into small steps: (See below) what is needed; this helps me understand my finances; 3 months with monthly review;

<p>1. Task: 2021 taxes</p>	<p>2. Monitor: Label file folder “2021 taxes” and put all forms in this file as they are delivered</p>	<p>3. What do I need? Create a checklist of what you'll need (see example attached)</p>	<p>4. Why is this important? Don't want penalty for not filing taxes on time</p>	<p>5. Timing: How long will I need? (Jan. Feb, March)</p>	<p>6. Small steps: Note in calendar to review (Jan., Feb. March) Check off as items arrive - final deadline 3/31 - get all to accountant</p>
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7. What do you need to help you with accountability? *For anyone with the first preference of E, you may want to find someone you can check in with and talk about your goal. You might want to find an “accountability buddy.” For anyone with the first preference of I, you might find it beneficial to identify an accountability buddy, but e-mail them after you have thought through all of this and see if you can check in with them from time to time. Either an E or an I might prefer to create a “reward” system where each time you take one step closer to your goal, you reward yourself with something.*

Good luck with trying out this program. If you get stuck or need help after trying this on your own, don't hesitate to reach out to me! (pburkecoaching@gmail.com).

Go to PART IV - Wrap-up/Final thoughts



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Example Tax Checklist - Year

INCOME	Tax Form Received			
XYZ Company (Household Member #1)				
ABC Company (Household Member #2)				
Any other income?				
Subtotal				
STOCK/INVESTMENTS				
ABC Investment Company (see tax reporting statement)			Long-term or short-term gains?	
XYZ Investment Company (see tax reporting statement)			Long-term or short-term gains?	
Sale of primary residence (See closing Statement)				
Purchase of new primary residence (See closing statement)				
IRA rollovers or conversions?			Taxable event?	
Subtotal				
DEDUCTIONS (if itemizing)				
Mortgage Interest (XYZ Bank)				
Charitable Donations				
RE Taxes (Primary residence)				
Professional Fees (Accounting Services 2020)				
Anything else?				
TAXES PAID	Household Member #1	Household Member #		
Federal				
Social Security				
State Taxes (if any)				
OTHER				
HSA Individual Contributions - see form				
1095-C (Florida Blue)				