

CREATING & KEEPING SYSTEMS THAT WORK

FOR YOUR HOME, FINANCES, AND LIFE

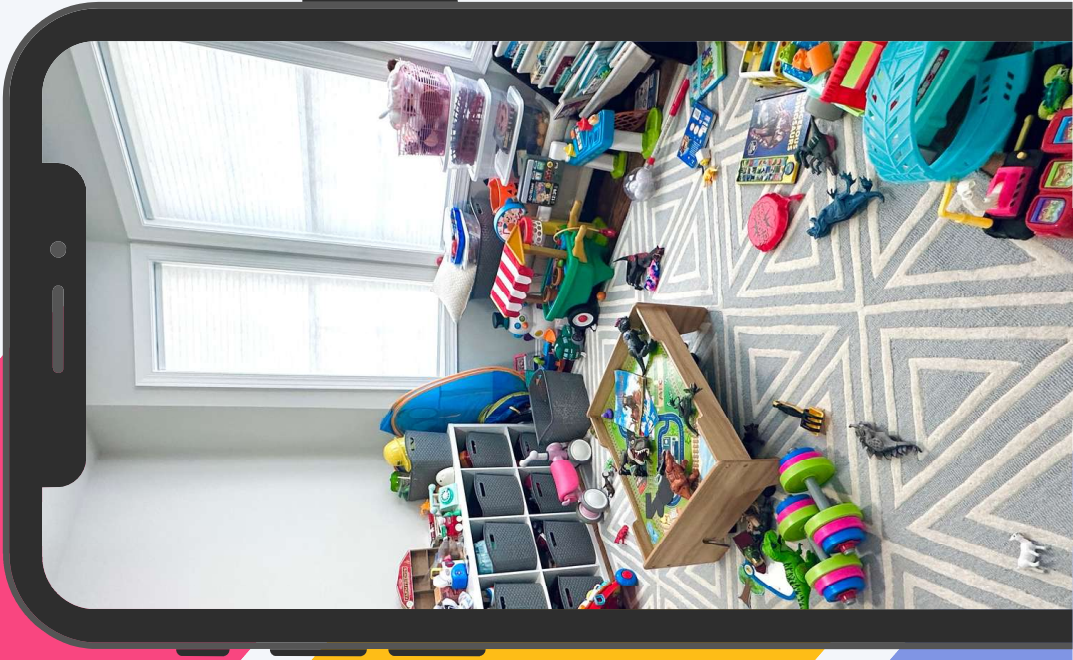


AMY COBB
FOUNDER
MINIMAL MEANS



Her
Path

LISA BURNS
FOUNDER
HERPATH



WHO WE ARE

At Minimal Means, we help real people in real homes create systems that work for their real lives.

We believe organization isn't about perfection, or those Pinterest perfect photos.

It's about simple, realistic solutions that reduce clutter, save time, and make daily life feel calmer and more intentional.



IF YOU...



Feel overwhelmed by clutter in your home, your schedule, or your finances and aren't sure where to start.



Want simple, realistic routines that make daily life feel easier.



You're ready to reduce stress and mental clutter with small, practical changes you can actually maintain.

WE'RE GLAD YOU'RE HERE.



QUICK REMINDER

This is a completely judgment-free conversation! We're all in different seasons of life, with different circumstances, figuring out systems that work for us.

It's a safe space to engage, share and support each other...
cause we all know life can be *messy!*



LET US KNOW...

If you could get just one part of your life organized today, what would it be — an area of your home, your finances, or something else?

3 STEP PROCESS



SORT

Gather everything in your space and see what you have.



EDIT

Decide what stays, what goes, and what moves.



ORGANIZE

Give everything a simple, lasting home.

SORT

Touch everything in the space

- Remove everything from the area you're working on, it could be a closet, a shelf, or a single drawer
- Sort items into categories to see what you have
- Group similar items together to spot patterns, duplicates, or items that don't belong

By touching and sorting every item, you gain a clear picture of your space and what's truly needed, making the next steps easier.



EDIT

Decide what stays, what goes, and what moves

- Be honest about what you actually use, need, or love
- Let go of items that no longer serve you—donate, sell, or recycle. Consider;
 - Buy Nothing Groups
 - Local Non-Profits & Organizations
- Move items that belong elsewhere so everything finds it's proper home

Editing creates clarity and frees up your space, making it easier to organize and maintain.

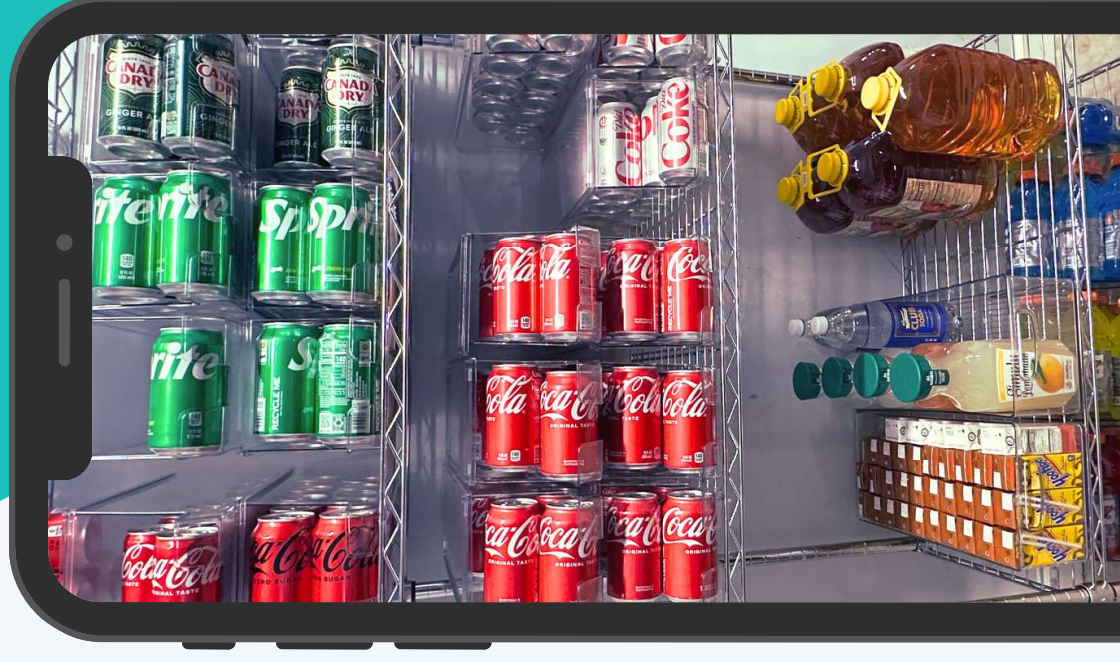


ORGANIZE

Create a place for everything

- Assign a clear, consistent place for each item so it's always easy to find and return
- Keep frequently used items accessible, and store less-used items thoughtfully
- Create simple routines to maintain order every day
Consider;
 - Things you can automate
 - Less visual clutter

When every item has a home and a system is in place, your space begins to work for you and your life.



FINANCIAL ORGANIZATION

THE SAME PRINCIPALS APPLY

SORT

- Gather all your financial information – key documents, bank accounts, bills, subscriptions, investments, and debts
- List recurring income and expenses so nothing gets overlooked
- Group similar items together; monthly bills, discretionary spending, savings

EDIT

- Identify unnecessary or duplicate expenses to cut or reduce
- Decide which financial habits need adjustment; savings, debt payments, subscriptions
- Consider consolidating accounts or simplifying payment processes for efficiency

ORGANIZE

- Set up automatic payments, savings, or investment contributions where possible
- Create a simple tracking system (spreadsheet, app, reminders) for ongoing oversight
- Establish routines to review finances weekly or monthly, keeping them manageable and stress-free

WHERE TO START



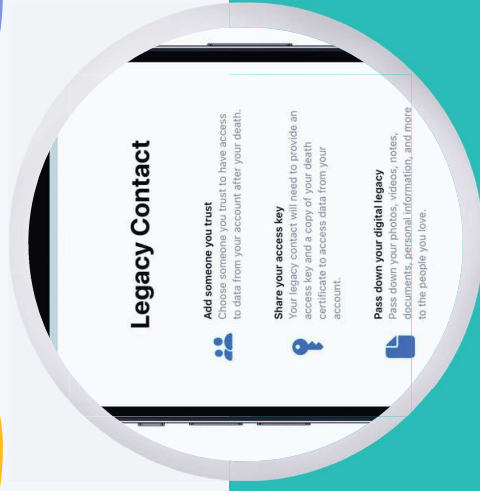
FINANCIAL DOCUMENTS

Important paperwork like tax returns, insurance policies, wills, investment statements, and loan documents



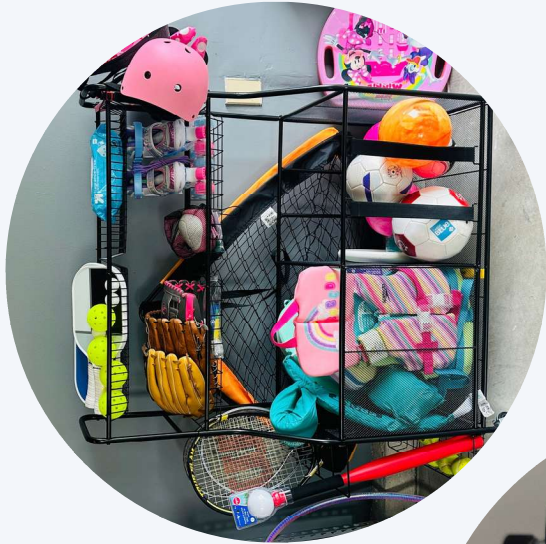
ACCOUNTS & ACCESS

A centralized list of all financial accounts with secure access to logins and institutions.
Banks, credit cards, retirement, loans, investments, HSAs



BENEFICIARIES & KEY CONTACTS

Ensure beneficiaries are up to date on wills, retirement accounts, life insurance, and other assets. Keep a list of trusted contacts (financial advisor, accountant, attorney, insurance agent)





QUESTIONS

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THANK YOU



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WISDOM COMMUNITY!



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