

# Happy Monday, Judy!

Week of Jan 20 - 27, 2026

## Success last week 🎉

- ☐ 3 gym sessions 💪
- ☐ 2 friend meet-ups
- ☐ 3 financial advisor meetings 💰
- ☐ 10,212 steps walked! 👣

## Your goals this week:

- 3 gym sessions 💪
- Plan New Zealand trip
- Share financial advisor plan with Loren & Kevin

## Decisions needed

Topic	Description	Decision
Finances	Netflix increased prices from \$15.99 to \$24.99 per month. They alternatively have a \$9.99 plan that would show ads while watching. Do you want to keep, switch plans, or cancel altogether?	<input type="checkbox"/> Keep <input type="checkbox"/> Switch <input type="checkbox"/> Cancel

Finances	Suspicious Zelle payment: Your \$100 payment to BRAD_PITT944 looks suspicious and that recipient has been associated with a fraud ring. Shall I report and try to get your money back?	<input type="checkbox"/> Looks ok <input type="checkbox"/> Report
Medical	Dr. Mather's office called and wanted to confirm your Thursday optometry appointment at 9:00am. Shall I confirm?	<input type="checkbox"/> Yes, confirm <input type="checkbox"/> No, cancel <input type="checkbox"/> No, reschedule

**Call Anne at 1-888-666-ANNE with decisions, requests, or changes**

*Judy's week of Jan 20 - 27, 2026*

## **Judy's to do**

---

- ☐ Call Anne to describe financial advisor meetings
- ☐ Call Anne to brainstorm New Zealand trip
- ☐ Plan dinner menu for Rick on Friday
- ☐ Return library books

## **Being handled for you (FYI)**

---

- Anne writes and shares financial advisor meeting summaries and draft recommendations with Judy after Judy calls
- Anne drafts outline of New Zealand trip options after Judy calls
- Anne pays gardener Tom when Judy confirms work
- Anne makes reservation for dinner with Helen
- Anne reviews State Farm insurance bill and pays if it looks normal
- Loren talks to Carlos about fountain construction