VESTIGE

THE MONEY TASKS STARTER

A 7-day guide to turn financial overwhelm into one organised next step.



By Vestige: Money Tasks & Habits

Guided tasks. Personal plans. Habits and reminders.

7 DAYS

1 TASK

02 · START HERE

START SMALL



You do not need a complicated spreadsheet to begin facing your money.

Many money tools begin by pulling in every transaction from every account. That can leave you with a noisy backlog before you have decided what actually needs your attention.

Vestige takes a different approach.

It helps you choose one money task, create a personal plan for what matters, set reminders for important dates and build habits that make it easier to return. You add the information that is useful to you. Vestige does not link to your bank account or move money.

THIS GUIDE HELPS YOU:

- Choose one money task that feels possible to begin.
- Make a bill, debt, spending question or goal more visible.
- Create a small routine for returning to your money plan.
- Prepare practical questions when you need professional help.

THIS IS NOT:

- ✕ A complex budgeting spreadsheet.
- ✕ A bank-connected transaction feed.
- ✕ A test of discipline, financial knowledge or personal worth.

03 · FIVE AREAS

PICK YOUR STARTING POINT



You do not need to solve your whole financial life today.
Start with the one area that feels most useful.

BILLS & EXPENSES

A due date, renewal, charge or household cost needs attention.

01

DEBT & CREDIT

You want to understand an obligation, balance, notice or next question.

02

SPENDING & LIFESTYLE

You want to look at a purchase pattern or make one values-aware choice.

03

CASH FLOW & FUTURE

You want to prepare for an upcoming cost, saving goal or money-timing question.

04

GETTING ADVICE

You need to prepare information or questions before speaking with a provider or qualified professional.

05

Start with the one that feels most useful. One clear action is enough.

YOUR MONEY, ONE STEP AT A TIME

A simple system for returning to what matters.

WHEN YOU HAVE A FEW MINUTES



1. Open your Personal Plan.
Add a goal, upcoming cost, obligation, question or decision that matters.

2. Choose one guided money task.
Read the plain-language steps and begin only what feels manageable.



3. Set a reminder if a date matters.
You can add a bill or due-date reminder to your iPhone Calendar.

4. Check in with a habit.
Create a routine such as “Review my upcoming expenses once a month.”



WHEN YOU HAVE MORE TIME

- Continue a task already in progress.
- Add a recorded contribution to a savings goal.
- Review an upcoming reminder.
- Read or listen to a Coaching lesson.
- Prepare a question for an appropriate provider or professional.

No bank sync. No automatic spending feed. No requirement to do everything today.

05 · SEVEN-STEP FLOW

YOUR FIRST TASK



Use this seven-step flow whenever a money task feels difficult to begin.

01

NAME THE SITUATION

Write down one thing that needs attention: a bill, a debt notice, a spending question, an upcoming cost or a goal.

02

CHOOSE ONE PILLAR

Bills & expenses, Debt & credit, Spending & lifestyle, Cash flow & future, or Getting advice.

03

OPEN ONE GUIDED TASK

Choose the next available practice or a free starter task.

04

READ THE "COMPLETE WHEN" LINE

Know what a truthful, practical completion looks like before you begin.

05

TAKE ONE BOUNDED ACTION

For example: find a due date, list one question, save a document, or write down an amount that you know.

06

SAVE WHAT MATTERS

Optionally add a structured item to your Personal Plan, or set a reminder for a date you do not want to miss.

07

CLOSE THE LOOP

Mark the guided practice complete only when you have completed that practice. A completed task is not a verified payment, result or financial outcome.

06 · WORKSHEET

THIS WEEK'S MONEY TASK



Week of: _____

HOW DID MONEY FEEL THIS WEEK?

- ☐ Steady
- ☐ Tight
- ☐ Heavy
- ☐ Unclear
- ☐ Avoided
- ☐ Hopeful

ONE THING THAT NEEDS MY ATTENTION:

_____

_____

_____

MY ONE ACTION FOR THIS WEEK:

- ☐ Find the next due date for one essential bill.
- ☐ Review one recurring charge before it renews.
- ☐ Write down one debt-related question.
- ☐ Add one upcoming cost to my Personal Plan.
- ☐ Record a contribution toward a savings goal.
- ☐ Prepare one question for a provider or qualified professional.
- ☐ Set a reminder for a date that matters.

WHAT I LEARNED OR STILL NEED TO CHECK:

_____

_____

_____

NEXT TIME I WILL RETURN TO THIS: **Date:** _____

I noticed what needs attention. I can return when I am ready.

PICK ONE SMALL TASK

When money feels difficult to begin, choose one bounded action.



WHEN YOU ARE AVOIDING A BALANCE OR STATEMENT

Do not make a full plan. Open one statement or account outside Vestige. Find one number or due date. Write down only what you know. Add a question to your Personal Plan if you need to return later.



WHEN AN UNEXPECTED COST APPEARS

Write down the cost, the due date if you know it, and what makes it urgent. Do not force yourself to solve every future decision today. Set one reminder or prepare one question.



WHEN SPENDING GUILT TAKES OVER

Pause before making the spend mean something about you. Name what happened in ordinary words: essential, planned, unplanned, comfort, convenience or unclear. Decide only the next practical action.



WHEN A BILL OR NOTICE FEELS CONFUSING

Save the document. Find the date, the amount and the question you do not understand. If needed, prepare those details for the provider or a qualified professional.

KEEP GOING WITH VESTIGE



Vestige: Money Tasks & Habits helps you keep returning to the money that matters—one guided action at a time.

GUIDED MONEY TASKS

Work through practical tasks across Debt & credit, Bills & expenses, Spending & lifestyle, Cash flow & future, and Getting advice.

PERSONAL PLAN

Create your own goals, upcoming costs, obligations, questions and decisions.

HABITS & REMINDERS

Build small routines and add important due dates to your iPhone Calendar.

COACHING

Read or listen to short lessons that explain common money concepts and help you prepare your next step.

Download Vestige: Money Tasks & Habits

AVAILABLE ON IPHONE

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Vestige provides guided practice and education. It does not connect to bank accounts, move money, verify external financial results, or provide financial, legal or tax advice.