

BIG PROJECTS

—> Take full ownership of major projects, managing them from start to finish. These projects often **span months**, requiring consistent follow-through, proactive problem-solving, collaboration and independent decision-making.

(2025 - Present)

A. Mold Issue (ongoing)

- In-depth research about mold, mold doctors, mold inspection and remediation companies
- Contacting different companies - asking questions based on research, scheduling inspection & coordinating all throughout the process
- Supporting Steph by brainstorming the next plan of actions

B. Closing of the escrow (on-going)

- Coordinating with the agent, broker and escrow
- Reaching out to the previous house owner
- Researching next steps on how to solve the issue

C. Legally Binding Will (Done)

- Initial research on how to have a legally binding will in California – google search & reddit
- Looked for Lawyers around LA and contacted them
- Created a draft for the lawyer
- Finalized and signed

D. Cat Adoption (Done)

- Looked for different cat adoption sites
- Checked different cats that Steph might be interested in adopting
- Scheduled visit to see cats in person
- Communicating with the adoption center during the whole adoption process

E. Loan Application (Done)

- Research what type of loan to apply for
- Call different loan companies and brokers
- Compile and send the needed information and files
- Set up an automatic payment method

ROUTINE TASKS

→ Daily or weekly administrative tasks

A. Inbox Management

- Checking and categorizing multiple inboxes
- Sending or flagging emails that need attention

B. Checking Reminders

- Checking Asana for tasks + sending Steph gentle reminders of tasks that needed to be done that day or the week

C. Organizing

- Checking WhatsApp & Asana for tasks assigned
- Organizing things that you need to prioritize and do for the day / week

D. Managing Bookkeeping

- Categorizing weekly transactions on Origin & YNAB
- Categorizing monthly business transactions on Wave

E. Troubleshooting & Researching

- Basic or in-depth research for a variety of topics
- Troubleshooting issues that occur in different tools or platforms

F. Crypto Related Tasks

- Adding daily cryptoverse videos to Lily's Ai to get summary
- Sending summarized files in Whatsapp
- Sending BTC & ETH risk levels on slack

Aside from these routine administrative tasks, you'll also be juggling and keeping track of other tasks / small projects.

OTHER PROJECT OR TASKS

A. Keeping track of dates / deadlines

- Shopping purchases and coordinating mailing returns
- Property tax payment deadline
- Biz and personal tax returns deadline
- Estimated annual tax payment date

B. Somatic Experiencing Training

- Making sure to register a month in advance for the next training date
- Compile and summarize videos/transcript
- Keep track of SE session logs - compiling files that is needed for the certification

C. Personal & Business Tax

- Compile all tax-related files + bookkeeping report
- Coordinate with Steph's accountant
- Make sure that taxes will be filed and paid at the right time

D. Organizing Learning / Reference Materials

- Obtain and organize transcripts for videos when needed
- Create clear summaries and structure written materials for readability
- Format documents to be reader-friendly and print-ready

E. Amex Platinum Sheet

- Track and give reminders of monthly, quarterly, bi annual and annual benefits
- Contact Amex for claims