

# Organize Your Occasion

By Lisa Haubenstock

Planning a wedding is a joyous and special time in life, but it can be stressful to keep all of the details of your wedding in order.

Vendors, guest lists, gifts, and thank you notes are a few that need to be organized with meticulous care, and in turn, require you to have that knack for detail to keep you on track.

Here are a few organizational tips to make this process easier...

There are some great online tools and apps that can keep your lists organized. I recommend WeddingHappy for staying on track with tasks and AllSeated for visualizing seating charts and venue layouts. You can even organize your entire wedding on Trello, and get a little help writing your thank notes on Postable.

If you are not into using digital tools, old school methods of keeping hand-written lists

will work just as well. Use a notebook that has pockets, and dedicate several tabs for each category - vendors, gifts, guest lists, etc. and take copious notes! Make sure to include all of the details like costs, vendor proposals with the scopes of work, and all additional specifics that are pertinent.

To avoid getting endless emails and text messages from guests, use a simple wedding website where they can check out your wedding details. Include important information for your wedding like dates, times, locations, dress codes, registries, transportation and lodging, and a day-of itinerary. Everything that appears on the invitations should be present on the welcome page of the website.

If you do decide to work with a professional planner or coordinator, a traditional wedding etiquette and guidebook (such as The Wedding Book) is an excellent source of information and expert advice, including tips,

tricks, and examples of useful timelines and checklists.

This will help you visualize and prioritize your goals without being overwhelmed with all your wedding details all at once.

Try and enjoy your wedding process as much as possible! The tools mentioned above will assist you every step of the way and help to make your special day an even greater success.

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## Homestead Tax Portability Overview: *What is it & How Does it Benefit You?*

By Kathy Schroeder

**D**isclaimer: this is a generic overview. Call the Broward County Property Appraiser's office for specific information at (954) 357-6830. Tax calculations are complicated and beyond the scope of this overview.

Tax portability may benefit you if you sell one homesteaded property (primary residence) and buy another (primary residence) in the state of Florida. There are property tax-saving benefits which can be significant for the new home.

In 1992, Florida voters passed and added Amendment 10, the "Save Our Homes" Amendment, to the Florida Constitution. The Amendment's intention was to prevent homeowners from being taxed out of their homes because of a rapid escalation in real estate values by limiting or "capping" the annual increase in the assessed value of a property that has a homestead exemption. [A homestead property is a taxpayer's primary/permanent residence.] The property will benefit from the Save Our Homes Cap in the second year of the new owner's Homestead Exemption. If, for example, a property owner applies for and receives the Homestead Exemption for 2020, the Assessed Value will be capped in 2021.

In 2008, Florida voters adopted a "portability" constitutional amendment to permit eligible homesteaded owners to move savings from one property to the next. That is, they can move their Save Our Homes benefit (up to \$500,000) from one homesteaded property to the next within the state of Florida.

"Homestead Portability" pertains to both downsizing and upsizing in value, based upon specified formulas. Homesteaded or primary residence homeowners may use "Portability" an unlimited amount of times for moves within Florida. Portability does not require the sale of a previous home, but merely that it is not claimed as a permanent residence any longer.

To be eligible for tax portability or to move the Save Our Home savings to a newly purchased home, the new Homestead must be established within two tax years of the "abandonment" of the Homestead at the previously Homesteaded property.

**Important:** There are strict timeframes within which a buyer must file for the homestead exemption. It is recommended that buyers apply for both the Homestead Exemption AND Portability at the same time. [The portability form is called Transfer of Homestead Assessment Difference or form DR501T.]

**Did You Know?** The Property Appraiser's Office does not set taxes. Their function is to properly assess each parcel of real and taxable personal property in Broward County each year. [Assessment is based on a complex formula and is not a simple math exercise.]

If you have questions about your home's assessed value, call the Broward County Property Appraiser's Office at (954) 357-6830.

**Resources:** Go to [www.bcpa.net](http://www.bcpa.net) and see both FAQ (Frequently Asked Questions) and look at the Portability Tax Estimator. 