

AI Made Easy After 50 • Life Organizer Kit

The Family Life Organizer

Fill in pages for your contacts, papers, health, money, week, and wishes, with an AI prompt for each page

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How to Use This Workbook

1. Print it, or print only the pages you need.
2. Fill it in by pencil so you can update it.
3. Use the AI prompt on each page to make a neat typed version, if you like.
4. Keep it somewhere safe, and tell one trusted person where it is.

Safety first: This book will hold private information. Do **not** write full account numbers, passwords, PINs, or your Social Security number here. Write the bank or company name only. Never type private numbers into an AI chat.

Last updated: _____ Kept at: _____

Section 1: My Important Contacts

AI prompt for this page: Turn this list of contacts into a neat one page table I can print and keep on the fridge: [list].

Role	Name	Phone	Notes
Primary doctor			
Specialist			
Specialist			
Dentist			
Pharmacy			
Financial advisor			
Insurance agent			
Attorney			
Accountant			
Neighbor			
Neighbor			
Emergency contact 1			
Emergency contact 2			
Clergy or faith leader			
Home repair person			

Section 2: Where Things Are

AI prompt for this page: *Make me a fill in the blank form called "Where Things Are" with 20 lines for my important papers and items.*

Item	Where it is kept	Who knows
Will or trust		
Power of attorney		
Health care directive		
House deed or lease		
Car titles		
Life insurance policy		
Home and car insurance		
Bank names (no numbers)		
Retirement account companies		
Tax returns (last 3 years)		
Safe deposit box and key		
Spare house keys		
Spare car keys		
Birth and marriage certificates		
Passport		
Medicare / insurance cards		
Military records		
Funeral or burial wishes		
Password list (if any)		

Section 3: My Health Snapshot

AI prompt for this page: *Format this health information into a one page summary my family could hand to a doctor in an emergency: [info].*

Name: _____ **Blood type (if known):** _____

Conditions:

Allergies (medicines, foods, other):

Medications

Medicine	Dose	When I take it	Prescribed by

Recent visits

Date	Doctor	Why	Next step

Questions for my next visit (check this page with your pharmacist or doctor):

Section 4: My Monthly Money Map

AI prompt for this page: Turn this into a calendar showing which bill is due on which day of the month: [list].

Money coming in

Source	About how much	Day it arrives

Bills and payments

Bill	About how much	Due day	Auto pay? Y/N

Subscriptions and memberships

Name	Cost	Renews	Still use it?

Section 4 (continued): Bill Calendar

Write each bill on the day it is due.

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Section 5: My Week on One Page

AI prompt for this page: *Help me plan a balanced week with appointments [list], one social outing, three walks, and simple meals. Show it as a table by day.*

Week of: _____

Day	Appointments	Meals	Walk / activity	Calls / people
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				

One thing I am looking forward to this week:

Section 6: Wishes and Stories

AI prompt for this page: Ask me 10 gentle questions about the things I want my family to know and remember, one at a time, then turn my answers into a letter to my family.

Things I want my family to know:

Special items and who I would like to have them:

Item	For	Why it matters

My wishes for care if I cannot speak for myself (talk these over with your doctor and attorney):

Stories I want to tell (use the Life Story Kit):

This page is not a legal document. Talk to an attorney about wills, trusts, and directives. Support: ted@tedmauro.com