BREEDO • PRACTICAL TOOLS FOR EVERYDAY LIFE

SENIOR LIFE MANAGEMENT SYSTEM

The complete personal organization, planning and peace-of-mind guide

PLAN • ORGANIZE • PREPARE • PROTECT

A practical, printable companion for keeping important information, routines and plans together.

PREMIUM WORKBOOK & PLANNER EDITION

HEALTH & CARE Keep care contacts and visit notes organized	**HOME & ROUTINES** Make everyday tasks easier to manage	**MONEY & RECORDS** Track bills and document locations

Created by Breedo Enterprises

WELCOME

A calmer place for the details of life

Important information is easier to use when it is organized, current and available to the right people. This workbook gives you a practical place to bring everyday details together.

WHAT THIS SYSTEM IS

A personal organization tool with guided setup steps, useful reference pages and printable worksheets. Use the sections that fit your life; skip anything that does not apply.

Inside your workbook

01 Health & care — Care contacts, appointment notes, medication and allergy records.

02 Home & household — Household contacts, maintenance notes and a home-safety review.

03 Bills & finances — Monthly budget, bill due dates and safer payment habits.

04 Important records — A secure location index for important documents.

05 Emergency readiness — A personal contact and disruption-preparation plan.

06 Scam protection — Warning signs, verification steps and response actions.

07 Family & helpers — A respectful plan for sharing responsibilities and information.

08 Personal planning — Weekly routines, monthly reviews and notes.

PRIVACY FIRST

Do not record passwords, PINs, full Social Security numbers or complete payment-card numbers here. Keep sensitive originals secure and share only the information a trusted helper genuinely needs.

GETTING STARTED

How to use this system

You do not need to complete this workbook in one sitting. A few carefully completed pages are more useful than a binder filled out in a hurry.

STEP	ACTION	WHAT IT MEANS
01	GATHER	Collect current contact details, statements and medication labels. Verify information as you go.
02	COMPLETE	Fill in the pages that matter to your household. Date information that may change.
03	STORE	Keep the workbook in a private, consistent place. Let an appropriate trusted person know where it is.
04	REVIEW	Choose a monthly review date. Update phone numbers, appointments, bills and document locations.

Your first 20 minutes

- Complete the personal quick-reference page.
- Add a trusted contact and an alternate contact.
- Write down the next appointment or important follow-up.
- Choose a safe place for the binder.
- Set a monthly review reminder.

IMPORTANT LIMIT

This workbook is an organizational resource, not medical, legal, financial, tax, insurance or emergency advice. Use qualified professionals for decisions in those areas. In an immediate emergency in the United States, call 911.

PERSONAL DASHBOARD

My essential information

Complete only the details you are comfortable keeping in your organizer. Store the workbook where private information is protected.

PERSONAL DETAIL	MY INFORMATION
Full name	
Preferred name	
Home address	
Primary phone	
Email address	
Preferred contact method	
Language or communication needs	
Trusted contact	
Where this organizer is kept	

Details that make daily life easier

PROMPT	MY NOTES
Best time to reach me	
I prefer helpers to contact me by	
A practical way someone can assist me	
Information I prefer to keep private	

PEOPLE & SUPPORT

Trusted contacts directory

List people who have agreed to be contacts. Confirm phone numbers periodically and identify the role each person can play.

ROLE	NAME	PHONE / EMAIL	NOTES
Primary trusted contact			
Alternate contact			
Neighbor / nearby helper			
Family member			
Primary care office			
Specialist / care office			
Preferred pharmacy			
Other important service			

EMERGENCY REMINDER

For immediate danger, serious injury or a medical emergency, call 911. Do not rely on a binder, email or routine contact for urgent help.

01

BREEDO / FIELD GUIDE

Health & care

Keep care-team details, appointment notes and personal health records organized for conversations with qualified professionals.

CARE TEAM

My care contacts

Use current contact information from the provider's official paperwork or website. Check that each office is still the right point of contact.

PROVIDER / SERVICE	NAME	PHONE	ADDRESS / NOTES
Primary care clinician			
Specialist			
Preferred pharmacy			
Insurance member services			
Other care professional			

Appointment preparation checklist

- Write down the main reason for the visit and the questions you want answered.
- Bring an up-to-date list of medicines and allergies, if relevant.
- Bring records or test results requested by the office.
- Ask what the next step is, who is responsible and when to follow up.
- Ask the clinician to clarify anything you do not understand.

HEALTH & CARE

Appointment planner

Prepare ahead so the visit can focus on what matters most. Record the date, location, questions and agreed follow-up.

DATE / TIME	PROVIDER / LOCATION	REASON FOR VISIT	FOLLOW-UP

Questions I want to ask

1.
2.
3.
4.

What I understood / next steps

For medical decisions, follow the advice of your licensed healthcare professional. This worksheet does not diagnose conditions or recommend treatment.

HEALTH & CARE

Medication and allergy record

Copy details from current prescription labels or confirm them with your pharmacist or clinician. Review this list whenever a medicine changes.

MEDICINE / PRODUCT	STRENGTH AS LABELED	DIRECTIONS AS LABELED	PRESCRIBER / NOTES

SAFETY FIRST

Never start, stop, combine or change medicines based only on this worksheet. Ask your prescriber or pharmacist to review medication questions and possible interactions.

Allergies or reactions to discuss

SUBSTANCE	REACTION / WHAT HAPPENED	CONFIRMED WITH / DATE

HEALTH & CARE

Personal care snapshot

A concise snapshot can help you prepare for appointments or coordinate support. Include only information that is relevant and appropriate to share.

TOPIC	MY NOTES
Health conditions diagnosed by a professional	
Past surgeries or major procedures	
Assistive devices used, if any	
Communication or accessibility needs	
What helps me feel comfortable during care	
Questions or concerns to raise	
Where relevant records are securely stored	

My care preferences / practical notes

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BREEDO / FIELD GUIDE

Home & household

Know important household contacts, keep maintenance requests visible and make time for a simple home-safety review.

HOME DASHBOARD

Household information directory

Record service contacts and practical details. Do not write alarm codes, keysafe codes or other security-sensitive information here.

HOUSEHOLD ITEM	CONTACT / DETAILS
Property manager / HOA contact	
Electric utility	
Water / sewer service	
Internet / phone provider	
Home insurance contact	
Maintenance provider	
Location of main water shutoff (if known)	
Location of electrical panel (if known)	
Smoke / CO alarm last checked	

Maintenance and repair tracker

ISSUE / REQUEST	WHO WILL HANDLE IT?	DATE REQUESTED	FOLLOW-UP

HOME SAFETY

A room-by-room walk-through

Move at a comfortable pace. Mark items needing attention and arrange qualified help for repairs. Do not attempt work that feels unsafe.

CHECK	SAFETY ITEM	ACTION / NOTES
■	Walkways and hallways are clear of clutter and loose cords.	
■	Frequently used items are within comfortable reach.	
■	Stairs and steps have secure handrails and good lighting.	
■	Rugs and mats are secure and do not slide.	
■	Bathroom floors and fixtures are in safe condition.	
■	Grab bars, if installed, are firmly secured.	
■	Smoke alarms are present and tested as directed.	
■	Carbon monoxide alarms are present where appropriate.	
■	Doorways and exits are clear.	
■	Entry paths and outdoor steps are well lit.	
■	A phone is charged and easy to reach.	

A PRACTICAL TIP

Choose one small improvement at a time. Ask a qualified home-safety professional or other appropriate professional about concerns that require expert assessment.

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BREEDO / FIELD GUIDE

Bills & finances

Create a clear monthly picture, track due dates and use safer habits when paying bills or responding to unexpected requests for money.

MONTHLY OVERVIEW

My household budget

Enter planned amounts first, then compare with actual amounts. Use estimates where needed and update the page as bills arrive.

MONTH: _____	PLANNED	ACTUAL
INCOME		
Social Security / pension / wages		
Other regular income		
TOTAL INCOME		
ESSENTIAL EXPENSES		
Housing / mortgage / rent / HOA		
Utilities / phone / internet		
Insurance		
Food / household supplies		
Transportation		
Healthcare / prescriptions		
Other essential expenses		
TOTAL EXPENSES		
REMAINING (income minus expenses)		

Monthly review prompts

- Which costs changed this month?
- Are any bills due before the next expected income?

- Is there a charge I do not recognize and need to verify?
- What is one practical action for next month?

BILLS & FINANCES

Bill due-date tracker

Record recurring bills and mark the paid date after confirming payment. Use contact details from a trusted statement or the provider's official website.

BILL / PROVIDER	DUE DATE	EXPECTED AMOUNT	PAID DATE	REFERENCE / NOTES

A safer bill-paying routine

- Pause when a caller or message demands immediate payment.
- Be cautious of requests for gift cards, cryptocurrency, wire transfers or unusual payment methods.
- Never share passwords or one-time verification codes with an unexpected caller.
- Check statements regularly and report unfamiliar transactions promptly.
- If unsure, end the conversation and contact the institution using a verified number.

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BREEDO / FIELD GUIDE

Important records

Create an index of where important documents are kept. This helps locate records without copying private details into the workbook.

DOCUMENT INDEX

Where my important records are kept

Record the storage location—not account numbers, passwords or sensitive document contents. Keep original documents secure.

DOCUMENT TYPE	SECURE LOCATION	LAST REVIEWED	WHO KNOWS WHERE
Identification documents			
Health insurance information			
Care records / test results			
Home / auto insurance			
Property / lease records			
Will / estate documents			
Advance directive / healthcare documents			
Tax records			
Other important records			

PROTECT YOUR INFORMATION

Do not leave original documents or sensitive copies in an unsecured place. Ask an appropriate legal or financial professional about formal documents and the right way to prepare and store them.

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Emergency readiness

Prepare for interruptions such as severe weather, a power outage or an unexpected need to leave home. Follow official local instructions.

PERSONAL READINESS

My emergency contact and action plan

Plan in advance for who to contact, where to go and what practical needs may require extra preparation.

PLANNING QUESTION	MY PLAN
Who will I contact first?	
Who is my alternate contact?	
Where could I go if I needed to leave?	
Who could help with transportation?	
What equipment or supplies need special planning?	
Where are my essential documents stored?	
How will I receive local alerts?	

Readiness checklist

- Keep a charged phone and a backup charging option available.
- Know how to receive local emergency alerts and weather warnings.
- Keep essential contact information on paper.
- Ask your pharmacist or clinician how to plan for medicines during a prolonged outage.
- If medical equipment depends on electricity, ask the provider and utility about an emergency plan.
- Know local evacuation guidance and accessible transportation options.

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BREEDO / FIELD GUIDE

Scam & fraud protection

Learn common warning signs and decide in advance how you will verify unexpected requests for money or personal information.

PROTECT YOURSELF

Pause, verify, then decide

Scammers may impersonate trusted organizations, create fear or urgency, or pressure people to keep a conversation secret. You are allowed to pause and check.

PAUSE Do not rush or respond under pressure.	**VERIFY** Use a contact number you independently trust.	**DECIDE** Act only when confident the request is genuine.

Warning signs

- A caller says you must act now to avoid arrest, account closure or loss of benefits.
- Someone asks for gift cards, cryptocurrency, wire transfers or unusual payment methods.
- A message asks for a password, verification code or remote access to your device.
- A supposed relative asks for money but tells you not to contact anyone else.
- A prize, refund or investment requires an upfront payment.

My verification plan

SITUATION	MY SAFE RESPONSE
Unexpected call from a bank or agency	Hang up and call using a number from an official statement or website.
Message from a relative asking for money	Call the relative using a number already saved; verify with another trusted person if needed.
Suspicious link or attachment	Do not click. Contact the organization independently.
I may have sent money or shared information	Contact the bank or payment provider immediately and report the incident to the appropriate authorities.

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BREEDO / FIELD GUIDE

Family & trusted helpers

Make support easier to coordinate while respecting personal choice, privacy and independence.

SUPPORT PLAN

How I would like people to help

Talk through this page with the people involved. Be clear about what help is welcome, what remains private and how often you would like contact.

TOPIC	MY PREFERENCE / AGREEMENT
Person I would like contacted first	
Tasks I am comfortable asking for help with	
Tasks I prefer to manage myself	
How often I would like a check-in	
Preferred way to communicate	
Where key information can be found	
Who may receive updates, with my permission	

Discussion notes and agreements

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BREEDO / FIELD GUIDE

Personal planning & review

Use a weekly rhythm and a short monthly check-in to keep this system useful instead of letting it become another chore.

WEEKLY ROUTINE

My week at a glance

Choose a weekly review time. Keep the plan realistic and leave room for rest, changes and unexpected needs.

DAY	APPOINTMENTS / ERRANDS	CALLS / FOLLOW-UPS	HOME TASKS
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
Saturday			
Sunday / review			

My three priorities this week

1.
2.
3.

One thing I can ask someone to help with

TASK	PERSON TO ASK	WHEN

MONTHLY MAINTENANCE

The 15-minute organizer review

Choose a regular date each month. A brief review helps keep information accurate and prevents small tasks from being forgotten.

DONE	MONTHLY REVIEW ITEM
■	Trusted contact phone numbers are still correct.
■	Upcoming appointments and follow-ups are recorded.
■	Medication and allergy information has been checked against current records.
■	Household service contacts and maintenance requests are current.
■	Bill due dates and recent statements have been reviewed.
■	Important document locations are still accurate and secure.
■	Home-safety items needing attention have an action plan.
■	Emergency contact and readiness plans still make sense.

MY REVIEW REMINDER

My monthly review date: _____ My helper, if any: _____

NOTES & FOLLOW-UP

A place to capture the details

Use these pages for questions, service calls, family discussions or anything you want to remember. Add dates so you can track progress.

NOTES PAGE 1

DATE: _____ SUBJECT: _____

NOTES PAGE 2

DATE: _____ SUBJECT: _____

NOTES PAGE 3

DATE: _____ SUBJECT: _____

FINISH STRONG

Small steps create a useful system

The purpose of this workbook is not to make life complicated. It is to put useful information where you can find it, make conversations easier and help you feel more prepared.

Your first three actions

01	**Complete your personal information and trusted-contact pages.**
02	Choose one day each month to review the organizer.
03	Tell an appropriate trusted person where the workbook is kept and what they may access.

BREEDO ENTERPRISES

Practical tools for everyday life.

Thank you for choosing a Breedo product. Use the pages that fit your needs, adapt the organizer to your household and seek qualified professional guidance whenever a decision requires it.

Product scope: This workbook provides general organizational worksheets and educational reminders. It does not replace professional medical, legal, financial, tax, insurance or emergency guidance. Users are responsible for protecting personal information and verifying details before relying on them.