

My Letter of Final Instructions

Prepared by:

Prepared on:

To:

The purpose of this letter is to state my final wishes and to provide guidance for finalizing my estate. Although I do have a will, and other legally binding documents exist, this letter should provide you information not included in those documents. My goal is to let you know the who, what, why and how of my estate finalization. I hope this information will be helpful to carry out my wishes. Thank you!

Who to Contact

I have listed the phone numbers, e-mail and physical addresses that I have for the following people:

Family/ Friends:

Religious Leader:

Funeral Director:

Attorney:

Representative from Past or Current Employment:

Insurance Company Representative/Agent (life, auto, homeowners, medical, other):

Financial and Investment Advisor(s):

Banker:

Tax Preparer:

Real Estate Agent:

Social Security Administration:

Others:

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Location of Important Documents

Will:

Trust:

Power of Attorney:

Healthcare Proxy:

Birth Certificate:

Marriage Certificate:

Divorce Documents:

Social Security Card/Statements:

Insurance Policies:

Deeds:

Bank Statements:

Credit Card Statements:

Income Tax Returns:

Stock Certificates:

Safe Deposit Box and Keys:

Mutual Fund Statements:

Brokerage Account Statements:

Retirement Plans Held at Old Employer:

IRA:

Annuities:

Other:

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Account Information

The account information and passwords that existed at the time I prepared this letter are included below:

Institution

Account and Owner

Address and Telephone Number

Banks:

Investment Accounts:

Other Financial Institutions:

Credit Cards:

Mortgages:

Computer Logins: User IDs/Passwords:

Other Important Passwords:

Miscellaneous

My organs are (are not) available for donation.

I would like my funeral to include:

- **Where and how you wish to be buried or cremated**
- **Church**
- **Who you would like to give your eulogy**
- **Flowers you want displayed**
- **Music to be played**

Certain personal property I would like to go to:

- 1.**
- 2.**
- 3.**

My pet should be looked after by:

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Sources of Money for the Future

Present or Past Employers (pension, life insurance, accident insurance, other benefits):

Insurance Companies (life insurance or other investment accounts):

Social Security (lump sum and monthly benefit):

Investment accounts (work with investment advisor or trusted advisor):

Veterans Administration:

Other (list):