



Attorneys at Law

## Letter of Instructions to My Family

Dear \_\_\_\_\_,

I am writing this letter to provide you with helpful, practical information you will need when the time comes. Although legally effective documents exist that control my affairs, I am giving this additional information to you (including about my wishes) so that hopefully the transition will be a bit easier. (Please note that my lawyer insists that I explain here that the contents of this letter do not override my legal documents). In all events, thank you for being there.

Following is a list of the people/places you may need, and their phone, email and address info:

Lawyer

Accountant

Insurance Agent(s)

Financial Advisor(s)

Employer/Business Associates

Clergy

Funeral Home

Other

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Some critical information you may need is as follows:

- I store my User Names/Passwords of all kinds here:  
\_\_\_\_\_
- I do \_\_\_ do not \_\_\_ have a safe-deposit box/at home safe; it's here: \_\_\_\_\_,  
the key/combo is here: \_\_\_\_\_
- My Social Security # is: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_
- My driver's license # is: \_\_\_\_\_, State: \_\_\_\_\_
- My passport # is: \_\_\_\_\_, it's here: \_\_\_\_\_
- My health insurance card/Medicare card is here: \_\_\_\_\_
- I do \_\_\_ do not \_\_\_ have Disability Insurance; info is here: \_\_\_\_\_
- I do \_\_\_ do not \_\_\_ have Long-Term Care Insurance, info is here: \_\_\_\_\_
- I do \_\_\_ do not \_\_\_ have Life Insurance; info is here: \_\_\_\_\_
- I am \_\_\_ am not \_\_\_ entitled to military/other benefits, info is here:  
\_\_\_\_\_

Following is a list to help you locate the originals of my important papers:

Have one?	Document	Location
<input type="checkbox"/>	Will	
<input type="checkbox"/>	Living Will/ Medical Directive/HIPAA Release	
<input type="checkbox"/>	Durable Power of Attorney	
<input type="checkbox"/>	Living Trusts	
<input type="checkbox"/>	Irrevocable Life Insurance Trust	
<input type="checkbox"/>	Charitable Trust	

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Have one?	Document	Location
<input type="checkbox"/>	Minor's Trust	
<input type="checkbox"/>	Pre-Nuptial Agreement	
<input type="checkbox"/>	Divorce Decree & Property Settlement Agreement	
<input type="checkbox"/>	Organ Donation	
<input type="checkbox"/>	Burial/Funeral Instructions	
<input type="checkbox"/>	Citizenship Papers	
<input type="checkbox"/>	Marriage Certificate	
<input type="checkbox"/>	Retirement Plan/IRA/401(k) plan beneficiary designation forms	
<input type="checkbox"/>	Life Insurance beneficiary designation forms	
<input type="checkbox"/>	Last year's Income Tax Return	
<input type="checkbox"/>	My checkbook register	
<input type="checkbox"/>	Car title/registration	

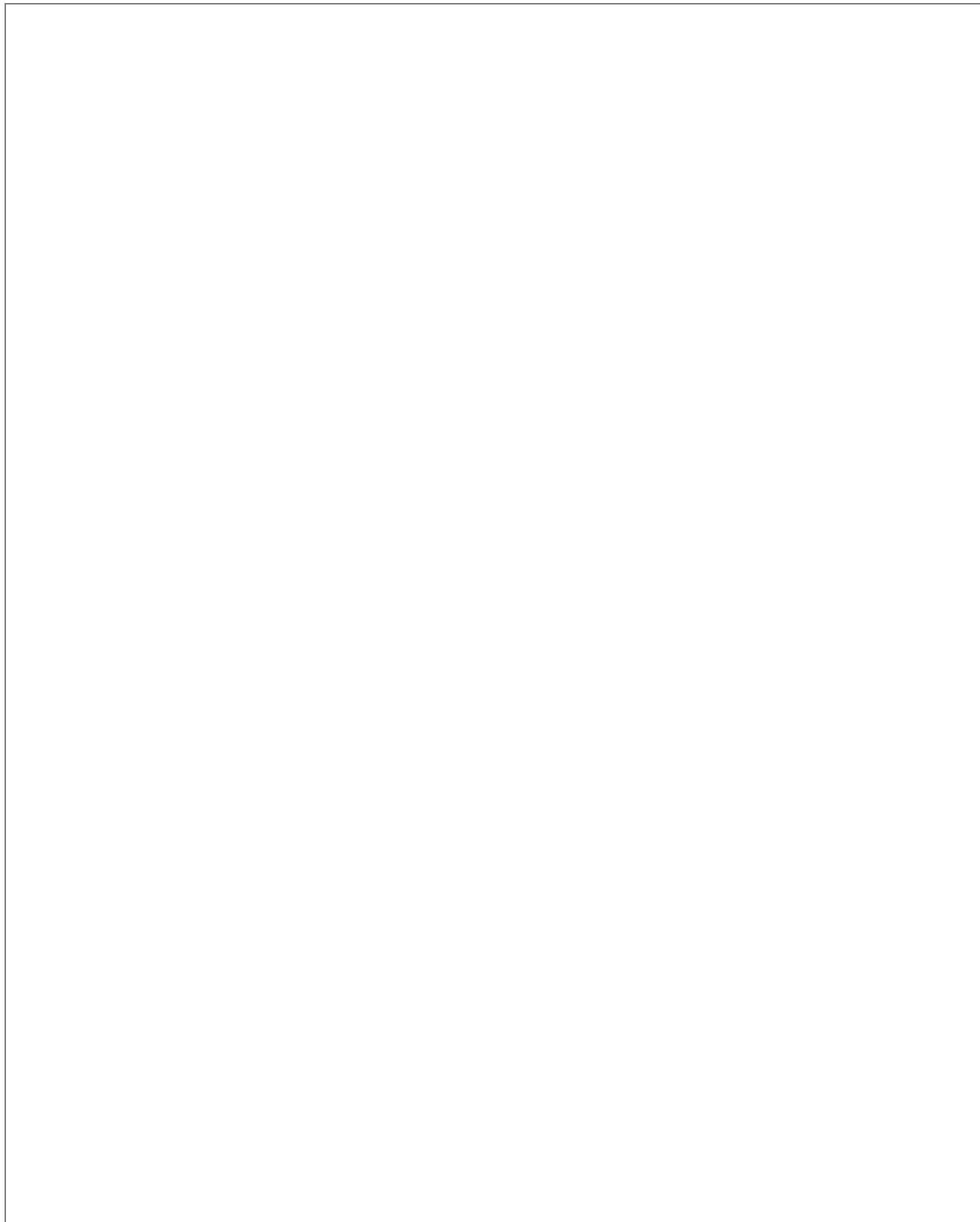
I am leaving an accompanying folder with information about my assets and liabilities. I have either prepared a list of these items including the name of the institution, account number and contact information, or I have copied a recent statement that will give you the information you will need. I am including information for things like:

- bank and investment accounts
- insurance policy declaration pages – health, disability, long-term care, life, car and homeowners insurance
- my recent income tax return
- information about business and real estate investments
- my liabilities – like mortgages, insurance premiums, credit cards and utilities, and child support/alimony obligations

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Finally, here is some additional information that I think you may need:



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