

## Letter of Instruction

I, [\_\_\_\_\_],

residing at [\_\_\_\_\_], hereby provide this Letter of Instruction to guide my executor, family members, and any other individuals involved in handling my affairs in the event of my incapacity or death.

### 1. Personal Information:

- Full Name: [\_\_\_\_\_]
- Date of Birth: [\_\_\_\_\_]
- Social Security Number: [\_\_\_\_\_]
- Marital Status: [\_\_\_\_\_]
- Emergency Contacts:

\_\_\_\_\_  
\_\_\_\_\_

### 2. Location of Important Documents:

Please find the following important documents in the specified locations:

- Last Will and Testament: [\_\_\_\_\_]
- Revocable Living Trust: [\_\_\_\_\_]
- Durable Power of Attorney for Finances: [\_\_\_\_\_]
- Durable Power of Attorney for Healthcare: [\_\_\_\_\_]
- Healthcare Directive/Living Will: [\_\_\_\_\_]
- Life Insurance Policies: [\_\_\_\_\_]
- Investment and Bank Account Information: [\_\_\_\_\_]
- Safe Deposit Box: [\_\_\_\_\_]

### 3. Financial Information:

- List of Bank Accounts:

\_\_\_\_\_  
\_\_\_\_\_

- List of Investment Accounts:

\_\_\_\_\_  
\_\_\_\_\_

- List of Credit Cards:

\_\_\_\_\_  
\_\_\_\_\_

- Mortgage Information:

\_\_\_\_\_  
\_\_\_\_\_

- Debts and Liabilities:

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#### **4. Funeral and Burial Preferences:**

- Preferred Funeral Home: \_\_\_\_\_
- Funeral Service Preferences:

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- Burial or Cremation Preferences: \_\_\_\_\_
- Location of Cemetery Plot or Ashes: \_\_\_\_\_

#### **5. Personal Messages and Wishes:**

- Any specific messages or wishes you would like to convey to family and friends.

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#### **6. Contacts:**

- Attorney: \_\_\_\_\_
- Financial Advisor: \_\_\_\_\_
- Accountant: \_\_\_\_\_
- Other Important Contacts:

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#### **7. Additional Instructions:**

- Any additional instructions or preferences regarding the handling of your affairs.

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#### **8. Signatures:**

I have executed this Letter of Instruction

on this [Date\_\_\_\_\_]

day of [Month, Year\_\_\_\_\_ / \_\_\_\_\_].

[Your Full Legal Name] \_\_\_\_\_

Date: [Date] \_\_\_\_\_

[Witness 1 Name]

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[Witness 1 Signature]

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[Witness 2 Name]

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[Witness 2 Signature]

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