

*Introduction:* Anyone may be asked at some time to take over the affairs of another individual because of death or illness. This responsibility would be much easier if a Letter of Instruction has been prepared. As estate plans are completed, it is recommended that such a letter be developed. There are no legal requirements (i.e., the letter may take any form, it may be handwritten or typed, and it need not be witnessed or notarized). A Letter of Instruction is not a binding legal document and cannot be a substitute for a properly executed Trust/Will (which is essential to direct the disposition of your property). Rather, a Letter of Instruction is intended to give survivors helpful guidelines to facilitate your wishes. You should adjust this form as needed to reflect your particular situation.

Name

Social Security Number

Spouse Name

Social Security Number

## I. Family Members

### A. Children

Name

Address

Phone Number

E-mail Address

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Name

Address

Phone Number

E-mail Address

---

Name

Address

Phone Number

E-mail Address

### B. Husband's Family

Father's Name

Address

Phone Number

E-mail Address

---

Mother's Name

Address

Phone Number

E-mail Address

---

Sibling 1 Name

Address

Phone Number

E-mail Address

---

Sibling 2 Name

Address

Phone Number

E-mail Address

---

Other Name

Address

Phone Number

E-mail Address

---

Other Name

Address

Phone Number

E-mail Address

---

Other Name

Address

Phone Number

E-mail Address

C. Wife's Family

Father's Name

Address

Phone Number

E-mail Address

---

Mother's Name

Address

Phone Number

E-mail Address

---

Sibling 1 Name

Address

Phone Number

E-mail Address

---

Sibling 2 Name

Address

Phone Number

E-mail Address

---

Other Name

Address

Phone Number

E-mail Address

---

Other Name

Address

Phone Number

E-mail Address

---

Other Name

Address

Phone Number

E-mail Address

**II. Persons Listed in Your Estate Plan**

*Include individuals not previously listed above.*

Name 1

Address

Phone Number

E-mail Address

---

Name 2

Address

Phone Number

E-mail Address

---

Name 3

Address

Phone Number

E-mail Address

---

Name 4

Address

Phone Number

E-mail Address

---

Name 5

Address

Phone Number

E-mail Address

---

Name 6

Address

Phone Number

E-mail Address

---

Name 7

Address

Phone Number

E-mail Address

---

### III. Professional Services Providers

Attorney Name

Address

Phone Number

E-mail Address

---

Accountant Name

Address

Phone Number

E-mail Address

---

Financial Advisor/Stockbroker  
Name

Address

Phone Number

E-mail Address

---

Insurance Agent (Life, Property,  
Umbrella, etc.) Name

Address

Phone Number

E-mail Address

---

Other Name

Address

Phone Number

E-mail Address

**IV. Assets**

A. Real Estate

Address 1

Owner(s)

APN

Tenant (if rental)

---

Address 2

Owner(s)

APN

Tenant (if rental)

B. Bank Accounts (Checking, Savings, CDs)

Bank Name

Owner(s)

Account #

Address

---

Bank Name

Owner(s)

Account #

Address

---

Bank Name

Owner(s)

Account #

Address

---

Bank Name

Owner(s)

Account #

Address

C. Equities (Stocks, Bonds, U.S. Bonds, Mutual Funds)

Company

Owner(s)

Account #

Address

---

Company

Owner(s)

Account #

Address

---

Company

Owner(s)

Account #

Address

---

Company

Owner(s)

Account #

Address

D. Retirement Accounts (IRA, 401k, 403b, 457, Pension)



Owner Name

Type of Account

Account #

Address

---

Owner Name

Type of Account

Account #

Address

---

Owner Name

Type of Account

Account #

Address

---

Owner Name

Type of Account

Account #

Address

E. Life Insurance

Company Name

Address

Phone Number

Policy Number

Face Value

Insured/Owner/Beneficiary

---

Company Name

Address

Phone Number

Policy Number

Face Value

Insured/Owner/Beneficiary

**F. Accounts Receivable**

Debtor's Name

Address

Phone

Amount/Terms

---

Debtor's Name

Address

Phone

Amount/Terms

**V. Liabilities**

(Mortgage, Car, Student Loans, Credit Cards, etc.)

Company/Person

Address

Phone

Amount/Terms

---

Company/Person

Address

Phone

Amount/Terms

---

Company/Person

Address

Phone

Amount/Terms

---

Company/Person

Address

Phone

Amount/Terms

---

Company/Person

Address

Phone

Amount/Terms

**VI. Location of Important Papers**

Estate Plan

Social Security Card

Insurance Papers

Investment Papers

Real Property Deed(s)

Tax Returns

Safe Deposit Box

Car Title(s)

Other

Secret Hiding Locations

**VII. Funeral Instructions**

A. Preferred Funeral Director

Name

Address

Phone

E-mail Address

B. Prepaid Funeral

C. Location of Burial Plot

D. Disposition of Ashes

**VIII. People Who Received Copies of This Document**

Name

Address

Phone

E-mail Address

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Name

Address

Phone

E-mail Address