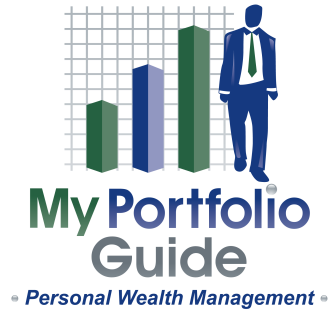


Name _____

Date _____



A Letter to My Family... Things you should know

Where are my important items:

Safety Deposit Box or offsite storage (and key) location:

Bank(s) & Brokerage account(s) information:

Credit Card(s) information:

Insurance policies:

Outstanding loans and debts:

Personal Documents- Birth, Marriage, Divorce, Prenuptial, Will, Power(s) of Attorney, Living Will, Personal Representative, Trusts, Cemetery deed:

My Property- deeds and mortgage, auto title(s):

Valuables- jewelry, collectibles, stock certificates, savings bonds, CD's, appraisals:

Other:

Who are my professional advisors:

Attorney:

Accountant:

Life insurance agent:

Property insurance agent:

Financial & Investment Advisor:

Primary Physician & Dentist:

Employer contact:

Personal Banker:

Business/Investment Partner(s):

Other:

What are my funeral preferences:

Funeral home/Cremation:

Funeral details- plot location, special music or readings, clergy, pallbearers, memorials or donations:

Organ donation (must make arrangements while living):

Obituary information/suggestions:

Friends & relatives you should remember to contact (include phone, email):

What about the items in my house:

How should it be divided? (Specific bequests should be put in writing)

My donation preference for the balance:

Other comments:

What about arrangement for the pet(s):

Who should receive them?

What about my electronic files and correspondence:

Email, Facebook & other social media accounts (user names, passwords, security questions etc.):

Online banking and bill paying accounts and passwords:

Who should have access to my computer?

Additional Comments and/or Personal Explanation of Will Provisions:

This is intended to be a guide for your family, not a legal document.

It does not take the place of a will or trust.

To be stored in a safe and secure place and only shared with a trusted contact or family member.

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