

WILEY ETTER

E S T A T E & B U S I N E S S

When a person passes away, the days to follow can certainly prove to be a whirlwind of anxiety, confusion & grief for the loved ones left behind.

This “Letter of Instruction” is intended to help you ensure that your family has access to the information they’ll need if & when you pass away.



“Letter of Instruction” to My Family

Your **Letter of Instruction** is a manual for your life, which is meant to streamline your family’s process of collecting & understanding your information, assets & wishes. Much of the information, such as your phone number, Social Security number, current legal documents, etc. already appears in our Estate Planning Questionnaire. However, in the event of your death, the following additional information can prove invaluable:

People to Notify of Your Death

Financial Planner: _____ Firm: _____ Phone: _____

Accountant: _____ Firm: _____ Phone: _____

Life Ins. Agent: _____ Firm: _____ Phone: _____

Auto/Home Ins. Agent: _____ Firm: _____ Phone: _____

Family/Friend: _____ Relationship: _____ Phone: _____

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Family/Friend: _____ Relationship: _____ Phone: _____

Additional Asset Information

Account No.: _____ Bank: _____ Other Signature: _____

Account No.: _____ Bank: _____ Other Signature: _____

Account No.: _____ Bank: _____ Other Signature: _____

Account No.: _____ Bank: _____ Other Signature: _____



Additional Asset Information (Continued)

Brokerage Acct No.: _____ Institution: _____ Advisor: _____
Brokerage Acct No.: _____ Institution: _____ Advisor: _____
Retirement Acct No.: _____ Institution: _____ Advisor: _____
Retirement Acct No.: _____ Institution: _____ Advisor: _____
Life Ins. Policy No.: _____ Institution: _____ Agent: _____
Life Ins. Policy No.: _____ Institution: _____ Agent: _____
Safe Deposit Box: _____ Bank: _____ Contact: _____
Pre-Arranged Funeral: _____ Funeral Home: _____ Contact: _____
Other: _____ Institution: _____ Contact: _____

Survivor's Benefits

Please list any applicable information for the following:

Social Security Information: _____
Veterans Benefits: _____
Pension/Retirement: _____
Other: _____

Location of Important Papers, Information & Valuables

Legal Documents: _____
Letters to Family: _____
Letters to Trustee: _____
Pre-Arranged Funeral Info: _____
Valuables: _____
Other: _____