

# Letter of Instruction and Notes to My Survivors

Name: \_\_\_\_\_

Date: \_\_\_\_\_

## LOCATION OF IMPORTANT DOCUMENTS

- R – Residence
- S – Safe Deposit Box (Bank and Key Location)
- O – Office
- N – Survivor Notebook
- NA – Does not apply

### Documents

- Adoption papers \_\_\_\_\_
- Birth certificates \_\_\_\_\_
- Children:
  - Adoption records \_\_\_\_\_
  - Birth certificates \_\_\_\_\_
  - Guardianship papers \_\_\_\_\_
- Citizenship Papers \_\_\_\_\_
- Divorce/Separation \_\_\_\_\_
- Driver’s License/Passport \_\_\_\_\_
- Employment Contracts \_\_\_\_\_
- Estate plan/legal documents \_\_\_\_\_
- Special Bequest List \_\_\_\_\_
- Marriage Certificate \_\_\_\_\_
- Military Discharge Papers \_\_\_\_\_
- Powers of Attorney \_\_\_\_\_
- Healthcare Directive \_\_\_\_\_
- Real Estate titles and deeds \_\_\_\_\_
- Burial Instructions and Plot \_\_\_\_\_
- Automobile Title \_\_\_\_\_

### Financial Records

- Insurance Policies \_\_\_\_\_
- Automobile \_\_\_\_\_
- Home owner \_\_\_\_\_
- Umbrella \_\_\_\_\_
- Medical \_\_\_\_\_
- Life \_\_\_\_\_
- Long Term Care \_\_\_\_\_
- Notes and other Loans \_\_\_\_\_
- Rental Property Records \_\_\_\_\_
- Stock Option Plans \_\_\_\_\_
- Stock Purchase Plans \_\_\_\_\_
- Stored/loaned valuables \_\_\_\_\_
- Other investment info \_\_\_\_\_

### Employment Benefits

- Corporate Retirement Plan \_\_\_\_\_
- Vacation /sick \_\_\_\_\_
- Other Death Benefits \_\_\_\_\_
- Profit Sharing Plan \_\_\_\_\_
- Pension \_\_\_\_\_

**Financial Records**

Annuity contracts \_\_\_\_\_  
Bank Statements \_\_\_\_\_  
Brokerage Statements \_\_\_\_\_  
Checkbook \_\_\_\_\_  
Credit cards \_\_\_\_\_  
Income and gift tax returns \_\_\_\_\_

**Other**

Safe combination \_\_\_\_\_  
Valuables \_\_\_\_\_  
Password list \_\_\_\_\_  
Other \_\_\_\_\_

**Notes:**

(List in which desk, file, cabinet, firebox, etc. the documents can be found.)

## KEY CONTACTS: PROFESSIONALS

### Financial Planner:

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Web: \_\_\_\_\_  
Email: \_\_\_\_\_

### Attorney:

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Web: \_\_\_\_\_  
Email: \_\_\_\_\_

### Tax Preparer:

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Web: \_\_\_\_\_  
Email: \_\_\_\_\_

### Doctor:

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Web: \_\_\_\_\_  
Email: \_\_\_\_\_

### Employer

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Web: \_\_\_\_\_  
Email: \_\_\_\_\_

### Other

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Web: \_\_\_\_\_  
Email: \_\_\_\_\_

A free resource provided by Birchwood Financial Partners | [www.birchwoodfp.com](http://www.birchwoodfp.com)

This document is provided as a resource and is not a legal document. Please consult an estate lawyer.  
Investment Advisory services offered through Birchwood Financial Partners, Inc. an SEC Registered Investment Advisor.

## KEY CONTACTS: PERSONAL

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
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## KEY CONTACTS: PERSONAL CONTINUED

Name: \_\_\_\_\_  
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## ARRANGEMENTS:

Name:

Organ Donation: I want to be an organ donor.

Donation to Medical Science: I want to donate my body to the  
University of for medical science.

Cremation: I want to be cremated  
Crematory and location:

Funeral Home to contact:

Cemetery Arrangements:  
Name of Cemetery:

Address:

Phone:

Location of Deed:

Plot in Name of:

Plot Number:

Special instructions:

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## NOTES TO LOVED ONES:

To Everyone:

Spouse:

Kids:

Overall Priorities:

Financial Well Being:



Children's Financial Well Being:

Maintain Family Harmony:

Preserve Estate and Save Taxes:

Trust Provision:

Children's Trust Provisions:

## RELATED TO CHILDREN:

This document is provided as a resource and is not a legal document. Please consult an estate lawyer.

Guardians for children:

Primary:

Successor 1:

Successor 2:

We picked these guardians because:

Mentoring Provision for Children:

Education Intentions:

Special Needs:

My wish for the children: