

A LETTER OF INSTRUCTIONS TO MY FAMILY

Name



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1. At the time of my death:

A. About organ donation: (please check one)

I have signed documents that will permit any of my bodily parts to be used, and I hope they can be.

I have not signed such documents as of yet, but I would like my family to donate any bodily parts that could be used to benefit another person.

I do not wish to be involved in organ donation.

B. About cremation of my remains: (please check one)

I do want to be cremated.

I do not want to be cremated.

It does not matter to me.

C. About my body/ashes: (check one and complete)

I want my body/ashes to be interred at _____

I want my ashes scattered over _____

D. About a memorial/funeral service/Mass: (check and complete all applicable)

I want a memorial service at _____

I want only a graveside service.

I would like _____ to conduct the memorial/funeral service.

I want (other) _____

E. About the funeral arrangements: (complete as applicable)

I have already made and paid for arrangements to be held at:

I would like my family to use _____
_____, but I have made no payment to them.

I have a cemetery lot/mausoleum space at _____
_____, which I would like to be used.

My preference is to be interred at _____
_____, but I have not made those arrangements.

F. About data for a death certificate/obituary: (complete in full)

1. (a) My father's name is/was _____
He was born on _____ in _____
And is living/died on _____ in _____

(b) My mother's maiden name is/was _____
She was born on _____ in _____
And is living/died on _____ in _____

(c) My spouse's name is/was _____
He/she was born on _____ in _____
And is living/died on _____ in _____

2. I was born on _____ in _____

3. These are the organizations, institutions, churches, and/or businesses that
have been part of my life and might be mentioned in an obituary:



G. About memorial gifts: (check and/or complete one)

I would like memorial gifts to be made to _____

and/or _____
or for these purposes or funds: _____

It should be stated that I wish people to make memorial gifts, if any,
to a church or charity of their own choice.

I have no preferences about this subject.

H. About all these matters: (check and/or complete one)

I want the decision of my _____ ,
or if he/she is not living, my _____ ,
to have the final decision on all of the above.

I want my children to make a final decision on these matters by
consensus, or, if that is not practical, by a majority "vote" within
the parameters as stated herein.

2. When it comes to handling the affairs of my estate:

A. The original of my Will is: (check and/or complete one)

In my safe deposit box in the _____ Branch
of _____ Bank.
In _____ .

B. My personal records, such as birth certificate, marriage license and the like,
are located in

C. In dividing my "tangible personal property": (check and complete)

See written memorandum located _____

I want each member of my family to receive back any items
he/she/they gave to me/us.

I want _____ to decide what's fair for all
concerned and his/her decision will govern.

D. About the administrative and financial matters involved for my family, I urge them to rely principally on the advice of (list 1st and 2nd choices in order):

_____ My lawyer _____

_____ My accountant _____

_____ My financial professional _____

_____ Other _____

3. About my financial records: (complete all)

A. About my insurance policies:

1. My life insurance policies are located in _____

And the agent to contact is _____

2. My auto insurance policies are located in _____

and the agent to contact is _____

3. My property insurance policies are located in _____

and the agent to contact is _____

B. Copies of my income tax returns are located in _____

_____ and they have been prepared by _____



C. About my securities: (complete all applicable)

Certificates are located in _____

My investment portfolio is held at the following firms:

(i) _____ at/with _____

(ii) _____ at/with _____

(iii) _____ at/with _____

(iv) _____ at/with _____

I have mutual funds with the following funds or families of funds:

I hold U.S. Savings bonds located in _____

D. About a safe deposit box: (check and complete)

I have none.

I have a box/boxes at _____

in the names of _____

and the key(s) is located _____

E. About my banking: (complete all applicable)

I have a checking account(s) at _____

I have savings account(s)/CDs at _____

F. My IRAs/401(k)/Pension/Profit Sharing Plans are held at the following firms:

These are the following to check:

(i) _____ at/with _____

(ii) _____ at/with _____

(iii) _____ at/with _____

(iv) _____ at/with _____

I have kept a list of beneficiaries. It is located in _____

_____ and/or is attached to this document.



G. About my obligations: (complete as applicable)

I owe nothing but current bills.

I owe \$ _____ for the mortgage on my/our residence.

I owe on credit/charges an amount of \$ _____

I have the following other obligations:

1. _____

2. _____

H. About my financial records:

They are located in the following places:

They are on my computer accessible by _____

Mr./Ms. _____ at _____

has the records of my securities costs and holdings.

I. About my computer passwords:

1. The following directions will help provide access to my computer passwords: _____

4. These are the names, addresses and phone numbers of people named in my Will: (attach separate sheet if necessary)

Name

Address

Phone Number
