

## 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**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

