

Letter of instruction checklist

What to include in your letter:

Date completed:

Notes:

- Complete list of assets
- Location of tangible assets
- Information for accessing liquid assets
- Names and contact information of any professionals who manage assets (attorneys, insurance agents, accountants, executors, etc.)
- Instructions for distributing assets of lesser value (e.g., personal effects)
- Location of relevant financial and legal documents (e.g., wills, titles, deeds)
- Social Security number
- Contact information of creditors
- Information regarding life insurance policy
- Instructions for the care or guardians of surviving pets
- Contact information of other beneficiaries
- Informal funeral instructions
