

CONTACT US

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A Letter of Instruction is a personal document that provides your loved ones with the practical, emotional, and logistical information they need during a crisis or after you pass away. This document is not a formal legal instrument.

Use this guide to compile your thoughts. You can write this in a notebook, a digital document, or as a letter to your successor trustee.

PROFESSIONAL & LEGAL CONTACTS

List the professionals who know your affairs best.

- ☐ Estate Planning Attorney at Clarity Legal Group
- ☐ Financial Advisor / Wealth Manager
- ☐ Accountant
- ☐ Insurance Agent
- ☐ Primary Care Physician

THE DIGITAL MASTER KEY

Make sure your Trustee and/or Executor can access your digital world.

- ☐ Device Access (Smartphone, Tablet, Computer)
- ☐ Login Information for Your Password Manager
- ☐ Instructions for Your Social Media Accounts

SENTIMENTAL ASSETS

Discuss items with high emotional value and interesting or important histories

- ☐ Family Heirlooms
- ☐ Valuable Jewelry
- ☐ Artwork
- ☐ Other Personal Property

FINANCIAL MAP & LOGISTICS

You don't need to list every balance, but it's helpful to know where the main assets are located

- ☐ Banks and Types of Accounts
- ☐ Retirement Accounts
- ☐ Safe Deposit Boxes
- ☐ Valuables that are Hidden in the Home

CARETAKING & DAILY LIFE

Explain what should happen in an emergency for those under your care

- ☐ Instructions for Minor Children's Guardian (Daily Routine, Likes/Dislikes, Pediatrician, School)
- ☐ Pet Care (Veterinarian, Dietary Needs, Who Will Care for Them)
- ☐ Pertinent Information About Your Home (Alarm Code Access, Maintenance Companies, Insurance Information)

FINAL WISHES & LEGACY

Take the guesswork out of a difficult time for your family.

- ☐ Service Preferences
- ☐ Obituary Details (Life Achievements, Charitable Works, Important Values)
- ☐ "Legacy Letters" (Final messages of love, shared values, or advice for your family members)



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