

Letter of Last Instruction

Important information
and decisions in the
event of my death





WHY YOU NEED A LETTER OF LAST INSTRUCTION AND HOW TO WRITE ONE

In my work as a financial advisor, I often help clients plan for what will happen after they pass away. While estate plans and wills cover the legal side, families can still face tough hurdles if key details or accounts are missed.

That's why I recommend creating a "letter of last instruction." It's not a legal document, but it serves as a roadmap for loved ones to locate accounts, follow final wishes, and simplify the probate process.

Think of it as a guide to ensure no detail gets lost. It takes time to put together,

so tackle it bit by bit. Include things like:

- Final instructions
- Financial account details
- Personal info and access points

When it's ready, share it with your spouse, attorney, and executor, and store a copy in a secure place—think safe, safe deposit box, or encrypted cloud storage.

If you're married or have a life partner, this is a good exercise to do together.

I'm here to help if you need guidance, so feel free to reach out anytime!

LETTER OF LAST INSTRUCTION

Created By _____

DOB _____ Date _____

Death Notification

Whom to notify about your death

<i>Name/Relation</i>	<i>Mobile Phone/Email Address</i>

Funeral Arrangements

Describe any funeral arrangements that you have already made.

Detailed arrangements already made:

Do you want to be buried or cremated? _____

Where do you want to be buried or your wishes for your ashes?

Preferred type of funeral _____

Funeral to be held at _____

Funeral Home choice _____

Where do you want your body to remain before the funeral?

Do you want an open casket? Yes No

Do you want a public viewing? Yes No

Do you have a pre-paid funeral or funeral fund? Yes No

If yes, where _____

I have already prepared my eulogy: Yes No

If yes, where is it _____

I would like these people to speak:

<i>Name/Relation</i>	<i>Mobile Phone/Email Address</i>

I would like the Pallbearers to be:

<i>Name/Relation</i>	<i>Mobile Phone/Email Address</i>

Other funeral service preferences, music, readings, etc.

People I would like to thank

<i>Name/Relation</i>	<i>Mobile Phone/Email Address</i>

Professional Contacts

Pastor/Religious Leader: _____

Lawyer: _____

Accountant: _____

Investment Adviser: _____

Insurance Adviser: _____

Bank Manager: _____

Personal Documents

My will/trust is with: _____

My Power of Attorney is: _____

My Enduring Power of Attorney is with:

Health: _____

Wealth: _____

My passport, birth certificate, and marriage certificate are:

My bank documents are:

My investment documents are:

Personal Insurances

Such as life, trauma, income protection, and health insurance. Also, remember any insurance through your employer.

Company	Benefit	Policy Number

Other Insurances

Such as car, home, contents, boat and travel insurance.

Company	Benefit	Policy Number

Debts

Money I owe and credit cards

Lender	Benefit	Notes

Debt owed to you

Make a list of all the debts owed to you; include full name, address, and telephone number of the debtor, payment terms and so on.

Full Name	Address	Phone	Location

How my bills are paid

Company	Benefit	Notes

Subscriptions

Online subscriptions, Streaming services, etc.

Company	Notes

Other important information not captured above

Other Notes

Signed: _____