

Chapter 10. Your Estate Planning Letter

The Estate Planning Letter is optional for you, but you may wish to fill it in to help your family with the following areas:

- Instructions for Gifts of Personal Items After Your Death
- Burial and Funeral Wishes
- Checklist of Actions to Take After a Death
- Information Organizer
- Key Advisors to be Contacted
- Relatives and Close Friends to be Contacted
- Record of Life Insurance Policies
- Record of Disability and Long-Term Care Insurance Policies
- Record of Retirement Plans
- Family Information and List of Your Property
- Instructions for Raising Your Children After Your Death

ESTATE PLANNING LETTER



- Directs Gifts of Special Personal Items.



- Funeral Instructions.
- Church and Other Services.



- Cemetery – Burial Wishes.
- Specifies Whom Memorials Go To.
- Other Instructions.