

How to Use This Letter of Instruction Template

What is a Letter of Instruction?

A letter of instruction is a document that lists all relevant financial information that your family members or executor need if something happens to you. It also lists contact information for important people in your financial life. Paired with other estate planning documents (e.g., trust, will, power of attorney ,etc.), a letter of instruction will help ensure your estate is settled per your intentions. It will also help make this difficult time period easier on the loved ones and professionals in your life.

Learn more here → [Everything You Need to Know About a Letter of Instruction](#)

What to Include Details About In Your Letter of Instruction:

- Assets and debts
- Insurance policies
- Jewelry and collectibles
- Digital assets (e.g., websites, social media)
- Professional contact information
- Family contact information
- Gifts and donations
- Legal documents
- Beneficiaries, guardians, and children
- Animals
- Safety deposit boxes
- Funeral and burial plans
- Website login credentials
- Personal note to heirs
- Obituary and final wishes

What to Do With Your Complete Letter of Instruction:

1. Give a copy to your trusted professionals and family members.
2. Place a copy with your other estate documents in a fireproof safe or safety deposit box.
3. Securely add a digital copy to your password manager (Dashlane, LastPass) or cloud storage service (Dropbox).
4. Review it at least once per year and make desired updates.
5. Sleep well knowing you've completed this important estate planning task!



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Ph: (858) 345-1197 · definefinancial.com

Letter of Instruction

Prepared For:

Prepared By:

Prepared On:

Last Update:

D D M M Y Y Y Y

Dear

I am writing this letter so that you have all my relevant financial information, in the case that something happens to me. You can refer to this letter, along with my other estate planning documents, to make sure the estate settlement process is smooth, quick, and as painless as possible.

Included in this letter is a list of important people, a list of important documents, a list of assets and liabilities, and instructions for any next steps.



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Important People

Financial Planner

Name	E-mail Address
Phone Number	Mailing Address
Firm Name	City/State
	Zip Code

Estate Attorney

Name	E-mail Address
Phone Number	Mailing Address
Firm Name	City/State
	Zip Code

Insurance Agent

Name	E-mail Address
Phone Number	Mailing Address
Firm Name	City/State
	Zip Code

Tax Preparer

Name	E-mail Address
Phone Number	Mailing Address
Firm Name	City/State
	Zip Code

Executor of my Estate

Name	E-mail Address
Phone Number	Mailing Address
Firm Name	City/State
	Zip Code



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Important Document

Advance Medical Directive/ Medical POA

Location Website
Phone Number Mailing Address
City/State
Zip Code

Durable General Financial POA

Location Website
Phone Number Mailing Address
City/State
Zip Code

Last Will and Testament

Location Website
Phone Number Mailing Address
City/State
Zip Code

Trust Documents

Location Website
Phone Number Mailing Address
City/State
Zip Code

Birth Certificate

Location

Social Security Card

Location



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Assets and Liabilities

Checking / Savings Account

Institution	Website
Phone Number	Mailing Address
Account #	City/State
Username	Zip Code
Password	

Checking / Savings Account

Institution	Mailing Address
Phone Number	City/State
Account #	Zip Code
Location	

Home Mortgage

Institution	Website
Phone Number	Mailing Address
Account #	City/State
Username	Zip Code
Password	

Credit Card Account(s)

Institution	Website
Phone Number	Mailing Address
Account #	City/State
Username	Zip Code
Password	



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Additional Credit Card Page

Credit Card Account(s)

Institution	Website
Phone Number	Mailing Address
Account #	City/State
Username	Zip Code
Password	

Credit Card Account(s)

Institution	Website
Phone Number	Mailing Address
Account #	City/State
Username	Zip Code
Password	

Credit Card Account(s)

Institution	Website
Phone Number	Mailing Address
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Credit Card Account(s)

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Assets and Liabilities

Cryptocurrency Wallet / Cold Storage

Location

Password

Individual Investment Account(s)

Institution

Website

Phone Number

Mailing Address

Account #

City/State

Username

Zip Code

Password

Workplace Retirement Account, 401(k), 403(b), etc.

Institution

Website

Phone Number

Mailing Address

Account #

City/State

Username

Zip Code

Password

Workplace Benefits

Institution

Website

Phone Number

Mailing Address

Account #

City/State

Username

Zip Code

Password

Health Savings Account

Institution

Website

Phone Number

Mailing Address

Account #

City/State

Username

Zip Code

Password



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Further Instructions

- Specific directions regarding how your estate should be settled

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- Information on your retirement account beneficiary designation elections

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- Directions for how to handle and care for pets

-
- Guardians for Minors or Disabled Adults

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- Incapacity Planning



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Personal Note

Name

Date

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