LASSAR & COWHEY LLP

Letter of Instruction to My Family

From: ______________________________

Dated: ______________________

Dear Family:

I am writing this letter to provide you with information that you may need when the time arises.

(A) Following is a list of the people you may need, and their phone and email info:

Lawyer:

Name: ______________________________

Phone Number: ______________________________

Email: ______________________________

Accountant:

Name: ______________________________

Phone Number: ______________________________

Email: ______________________________

Insurance Agent:

Name: ______________________________

Phone Number: ______________________________

Email: ______________________________

Investment Advisor:

Name: ______________________________

Phone Number: ______________________________

Email: ______________________________

Employer:

Name: ______________________________

Phone Number: ______________________________

Email: ______________________________

Other:

Name: ______________________________

Phone Number: ______________________________

Email: ______________________________

(B) Some critical information you may need is as follows:

- My User Names and Passwords of all kinds can be found/accessed here (*including for my computer/phone if I store them there*): ____

- I use Account #: __________________________ at ___________________________________ Bank, ____________________ Branch for regular bill paying. I do ☐ do not ☐ bank on-line; if so, I have left user name and password information for this account.

- I do ☐ do not ☐ have a safe-deposit box/at home safe; its location is: _____________________; the key/combination is here: _____________________________

- My Social Security # is: _______ -______ - ______________.

- My driver's license # is: ________________________________/State: __________________

- My passport # is: ____________________; its location is: _____________________________

- My health insurance/Medicare/Supplemental Health Insurance card/info are kept: ____

- I do ☐ do not ☐ have Disability Insurance; info is here:_____________________________

- I do ☐ do not ☐ have Long-Term Care Insurance; info is here:_______________________

- I do ☐ do not ☐ have Life Insurance; info is here:__________________________________

- I am ☐ am not ☐ entitled to military/other benefits; info is here: ____

- I do ☐ do not ☐ have cryptocurrencies or NFT's; info – including access info, is here: ____

(C) My original legal documents can be found here:

√	Document	Location
☐	Last Will	
☐	Living Will/ Medical Directive/HIPAA Release	
☐	Durable Power of Attorney (financial)	
☐	Living/Revocable Trusts	
☐	Irrevocable Life Insurance Trust	
☐	Charitable Trust	
☐	Family Trust	
☐	Special or Supplemental Needs Trust	
☐	Pre-Nuptial Agreement	
☐	Divorce Decree(s) & Property Settlement Agreement	
☐	Organ Donation	
☐	Burial/Funeral Instructions	
☐	Citizenship Papers	
☐	Marriage Certificate	
☐	My checkbook register	
☐	Car title/registration	
☐	Boat title/registration	
☐	Death Certificate for a predeceased spouse	
☐	Cemetery Deed/Contract for pre-need arrangements	
☐		

(D) Along with my legal and estate planning documents, I intend to leave a periodically updated folder in which I will accumulate the information that you may need. For example, I will include things like:

- Recent bank and investment account statements (one each), including for retirement accounts (IRA's/401(k)'s/403(b)'s), direct investment accounts, and annuities, together with copies of beneficiary designation forms that I have submitted
- Insurance policies/declaration pages for my health, disability, long-term care, life, car and homeowners' insurance, and as to life insurance, copies of beneficiary designation forms that I have submitted
- Recent federal income tax return
- Employee benefits and employer contact info
- Real estate and business investment documents, including shareholders', operating and partnership agreements, deeds, stock/proprietary lease (as to Coop apartments)
- Info about significant liabilities and other obligations, such as personal and business loans, mortgages, real estate tax bills, insurance and coop/condo maintenance bills
- Crypto-currency holdings and access information

(E) Some additional thoughts/information: