



## **LETTER OF INSTRUCTIONS**

A letter of instruction should generally contain the following information:

1. Persons to be notified upon testator's death, with their addresses and telephone numbers:

- a. Funeral home.
- b. Relatives.
- c. Employer.
- d. Executor.
- e. Lawyer.
- f. Partners or business associates.
- g. Other persons.

2. Burial and funeral instructions:

- a. Cemetery plot location, deed number and location of deed.
- b. Facts needed by funeral director, such as testator's full name, residence, marital status, name of spouse, date of birth, place of birth, father's name and birthplace, mother's maiden name, military service, length of residence in the United States, length of residence in state, social security number, occupation, special wishes and desires.
- c. Words to be inscribed on gravestone.
- d. If cremation is desired, specification as to disposition of ashes.

3. Location of all important legal and personal papers:

- a. Will.
- b. Insurance policies.
- c. Bank books, checkbooks and certificates of deposits.
- d. Bonds and stock certificates.

- e. Social security and medicare cards and papers.
  - f. Title and registration documents of automobiles.
  - g. Titles, deeds and other relevant papers relating to real property.
  - h. Birth and baptismal certificates.
  - i. Marriage certificate.
  - j. Judgment of dissolution of marriage or divorce decree and separation or settlement agreements.
  - k. Military records.
  - l. Naturalization papers or alien registration card.
  - m. Income tax returns.
  - n. Credit cards.
  - o. Mortgage and other documents relating to outstanding loans.
  - p. Bank statements and canceled checks.
  - q. Important warranties, such as warranties for appliances.
  - r. Important receipts, such as receipts for home improvements.
  - s. Other legal papers.
4. Location of safe-deposit box, number, in whose name it is registered, location of key and list of contents.
5. Membership in any fraternal or mutual aid association which has as part of its membership death benefits or insurance coverage, address and telephone number of association, person to contact as to procedure for collecting benefit, and location of certificate of membership or certificate of insurance.
6. List of life and accident insurance policies, with name and address of company, policy number, amount of coverage, beneficiaries, name, address, and telephone number of insurance agent, and instructions to file claim immediately.
7. List of homeowner's, fire, casualty and other insurance policies, including name and address of company, policy number, amount of coverage, beneficiaries, and name, address, and telephone number of insurance agent.
8. List of insurance policies insuring other members of family for which testator has been paying premiums, including name and address of company, policy number, amount of coverage,

beneficiaries, and name, address and telephone number of insurance agent.

9. Social Security number, with instructions to call local Social Security office to inform them of testator's death, to ask for an appointment and what papers to bring, and instructions to file claim immediately.

10. List of bank accounts, with name and address of bank, account number, name or names on the account, type of account, and any special instructions.

11. List of all bonds, with their serial numbers, denominations, and names in which they are registered.

12. List of all shares of stock, with names of companies, number of shares, in whose names they are issued, and name and address of stockbroker.

13. List of pension or profit sharing plans, and the location of any pertinent documents.

14. List of all credit cards, with the name and address of the issuer and card number.

15. List of monetary obligations, including mortgages, with name and address of bank or other lender, account number, name appearing on loan documents, amount of loan, monthly payment, collateral, if any, and whether there was life insurance on loan, and if so, name and address of insurer, with instructions to notify and file claim immediately.

16. List of all automobiles, with year, make, model, body type, number of cylinders, color, and identification number.

17. List and location of personal effects and other personal property with sentimental value, and names and addresses of persons to whom such property should be given.

18. Matters relating to house or condominium, including address, in whose name it is recorded, and legal description. Include a list of home improvements, with the date and cost. Include also a statement as to actual cost of the house, and expenses incurred in purchasing house.

19. If renting, name and address of lessor, expiration date of lease, location of lease agreement and receipts of payments.

20. If veteran, instructions to notify nearest Veterans Administration of testator's death and to ask what benefits are available.

21. Other special instructions.

**ROBERTS & ROBERTS, LLP**