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|  | **Instruction letter topics** |  |
| This does not have to be filled in in its entirety. But it is a good place to scribble in desires and daily touch points, including the locations of important documents |
|  |  |  |  |
| **Emergency Info** |  |  | **Service providers** |
| People to notify |   |  | child care |
| Child care |   |  | animal care |
| Child guardian |  |  | cleaning |
| Animal care |   |  | lawn and garden  |
| Physician |  |  | contractor |
| Adult care |  |  | handyman |
| Care of property |   |  | pool maintenance |
|  |  |  | pest control |
| Address book |   |  | appliance repair |
| Living Will |  |  | vehicle repair |
| Finl POA |  |  | painter |
| Health care POA |  |  | locksmith |
| Other emergency info |  |  |  |
|  |  |  | **Insurance** |
| **Short Reach Assets** |  |  | Life |
| Cash |  |  | Home owner/rental |
| checking acts |  |  | medical |
| savings accts |  |  | vehicle |
| money mkt acct |  |  | disability |
| CD |  |  | annuity |
| traveler’s checks |  |  | other |
| debit card (s) |  |  |  |
| ATM Card |  |  | **Advisors Money/Tax /legal** |
| Crypto wallet |  |  | Accountant |
| other |  |  | RE broker |
|  |  |  | Insurance broker |
| **Current Income sources** |  | Auto Broker |
| Employer |  |  | FA |
| Pension |  |  | attorney |
| Business owner |  |  | Other |
| Trust fund |  |  |  |
| Alimony |  |  | **What you owe** |
| child support |  |  | Monthly bills (list) |
| worker's comp |  |  | rent |
| Insurance settlement |  |  | money (written agreement) |
| rental inc |  |  | money (oral agreement) |
| royalties |  |  | object (written agreement) |
| dividends |  |  | object (oral agreement) |
| interest |  |  | court judgement |
| annuity |  |  | retainer |
| Frequent flier memberships |  | other |
| other |  |  |  |
|  |  |  | **What is owed to you** |
| **Pension/retirement accts** |  | money (written agreement) |
| social sec |  |  | money (oral agreement) |
| public employment |  |  | object (written agreement) |
| private empl |  |  | object (oral agreement) |
| consulting |  |  | court judgement |
| military |  |  | retainer |
| union |  |  | borrowed object (list) |
| IRA/ROTH etc |  |  | frequent flier info |
| 401k |  |  | other |
| other |  |  |  |
|  |  |  | **Burglar Alarms** |
| **Securities**  |  |  | house  |
| Stocks  |  |  | vehicle |
| held at broker |  |  | business |
| physical hold |  |  | boat |
| bonds |  |  | other |
| mutual funds |  |  | where to find documentation |
| US or fgn treasury sec |  | cameras |
| commodities |  |  |  |
| gold, bars, coins etc |  |  | **Locked places/keys** |
| collectables |  |  | safe-deposit box |
| Any open positions |  |  | things needing keys |
|  |  |  | combination lock |
| **Real Estate** |  |  | safe/combination |
| Primary residence |  |  | access card/code |
| Family home |  |  | mini/public storage/contract |
| Vacation home(s) |  |  |  |
| co-op |  |  | **Hiding Places** |
| rental property |  |  | spec hiding place |
| tenant info |  |  | computer and other passwords |
| mobile home |  |  |  |
| timeshare |  |  | **Medical information** |
| undeveloped land |  |  | family practitioner |
| agricultural land |  |  | specialist |
| boat/marina space |  |  | dentist |
| airplane hanger |  |  | eye care provider |
|  |  |  | other provider |
| **Business Interests** |  |  | medical hist (list) |
| Sole proprietor |  |  | immunization |
| Partnership |  |  | other info incl health care provider |
| limited partnership |  |  |  |
| LLC |  |  | **Memorabilia/important things** |
| corp |  |  | photos |
| jv |  |  | letters |
| collaborative agreement |  | movies/videos |
| e-commerce website |  |  | cassettes |
| virtual cash accounts (paypal) |  | mementos |
| other |  |  | other |
| Copyrights, patents |  |  |  |
| Copyrights |  |  | **Personal documents** |
| patents |   |  | birth certificate |
| trademark |  |  | passport |
| residuals |  |  | drivers license |
| virtual cash accounts (paypal) |  | other license |
| other |  |  | marriage/divorce papers |
|  |  |  | nuptial agreement |
| **Vehicles, boats, planes** |  | cohabitation agreement |
| motor vehcile 1 |  |  | immigration/naturalization |
| MV2 |  |  | other legal |
| etc |  |  | educational |
| Motorcycle |  |  | professional |
| Motor home/RV |  |  | employment |
| Boat |  |  | religious |
| Plane |  |  | ceremonial |
| Bicycles |  |  | patents |
| other |  |  | military |
|  |  |  | other personal docs |
| **Home inventory/valuables** |  |  |
| Antiques |  |  | **Your family** |
| Appliances |  |  | Immediate family-living |
| Art (list) |  |  | immediate family-deceased |
| Bedding |  |  | ancestors |
| books |  |  | other family |
| China/pottery |  |  |  |
| clothing |  |  | **Death plans** |
| coins |  |  | organ donations |
| collectibles |  |  | people to notify |
| computers |  |  | body disposition |
| crystal/glassware |  |  | obituary/death notice |
| electronic equip/ Stereo/TV etc |  | funeral/service details |
| Floor coverings (insert) |  | pre-need contract |
| furs |  |  | burial insurance |
| furniture |  |  | final resting place |
| garden/yard items(list) |  | epitaph |
| tractor/lawn mower/blower |  | memorial service |
| gems(list) |  |  | other plans |
| guns(list) |  |  |  |
| holiday items |  |  | **Estate matters/will** |
| jewelry |  |  | will |
| plants/living things |  |  | codicil |
| musical instr |  |  | trust documents |
| office equip (list) |  |  | trustee |
| pets |  |  | executor/personal representative |
| photo equip |  |  | guardian/conservator |
| precious metals |  |  | estate planning attorney |
| recreation/camping equip |  | letter of instruction |
| religious items |  |  | list of assets |
| silver utensils |  |  | other estate matters |
| sports equip |  |  |  |
| stamps |  |  |  |
| tapes/CDs/recordings |  |  |  |
| home movies |  |  |  |
| tools/equip |  |  |  |
| window coverings |  |  |  |
| wine/liquor |  |  |  |
| other |  |  |  |