**Letter to my heirs: (each box will expand to accommodate comments and information)**

**Attach this form to your letter**

Where a hard copy of records can be found:

|  |
| --- |
|  |

Social Security number and birth date (both if married)

|  |  |
| --- | --- |
|  |  |

If a veteran—service number and where discharge is located

|  |
| --- |
|  |

ASSETS:

Real Estate and where deeds are located

|  |
| --- |
|  |

Automobiles and where titles are located

|  |
| --- |
|  |

Jewelry, art, etc. and location

|  |
| --- |
|  |

Other assets

|  |
| --- |
|  |

LIABILITIES:

Mortgage and contact information

|  |
| --- |
|  |

Other debt—with contact information

|  |
| --- |
|  |

OTHER INFORMATION:

Life insurance policies and contact information

|  |
| --- |
|  |

Bank account, brokerage account, etc., account number, and contact information

|  |
| --- |
|  |

Credit cards and contact information

|  |
| --- |
|  |

List how bills are paid—List those paid via credit card, automatic checking account, etc.

|  |
| --- |
|  |

User ID and Password for computer access to accounts

|  |
| --- |
|  |

Have you given money to heirs? (Compensate so all receive equal amounts)

All receive $100,000 minus amount previously received. Balance is then divided equally.