**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, last three years 1040 income tax forms, Health POA, Financial POA, Trust:

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Social Security number and birth date (both if married)

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If a veteran—service number and where discharge DD-214 form is located

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**ASSETS:**

Real Estate and where deeds are located

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Automobiles and where titles are located

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Jewelry, art, etc. and location

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**Other assets**

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**LIABILITIES:**

Mortgage, how paid, where paid, and contact information

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Other debt—with contact information

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**OTHER INFORMATION:**

Church contact – Type of memorial/funeral service – Write an Obituary, Eulogy (What do you want said?)

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How to send Email to contacts to be notified – phone number list, etc.

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Preferred Funeral Home, if any – what to do with your body

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Life insurance, Health, Medicare, doctor contact information and location of policies

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Bank account, brokerage account, etc., account number, and contact information; Safe Deposit Box (if none, say so)

(Do not immediately inform bank of a death as the account will be immediately frozen)

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Credit cards and contact information

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

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User ID and Password for computer and accounts

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Items promised to family members, friends, enemies, etc.

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

***Compensate by giving each $100,000 minus the amount previously received. Balance of inheritance is divided equally.***