

Letter of Intent

This information was compiled by _____ on the ____ day of _____, 20__ and I plan to update it as situations change.

The intended readers are 1) _____, 2) _____ and 3) _____. This is intended to be used in the event of my incapacity or death.

The most recent copy of this Letter of Instruction is a file named _____ located in the _____ folder on my personal computer - will provide the information you need to begin to manage our assets or distribute them upon my death. Do not rely solely on this printed copy of this document that might be out of date.

Real Estate:

I own an interest in the following real estate:

Address: _____

Address: _____

Address: _____

Address: _____

Automobiles

I own an interest in the following automobiles:

Make: _____ Model: _____

VIN: _____

Make: _____ Model: _____

VIN: _____

Make: _____ Model: _____

VIN: _____

Electronic Data

All important information is stored electronically on my computer and synced with my online account at _____.

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My computer is _____.

Username: _____

Password: _____

My online storage is at _____.

Username: _____

Password: _____

My online photographs are stored at _____.

Username: _____

Password: _____

My online videos/movies are stored at _____.

Username: _____

Password: _____

My online music is stored at _____.

Username: _____

Password: _____

Bank and Investment Accounts

Almost all of my financial accounts are managed online. The Web sites, account information, usernames and passwords for all accounts are listed below:

Account No. 1 _____

Username: _____

Password: _____

Account No. 2 _____

Username: _____

Password: _____

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Account No. 3 _____

Username: _____

Password: _____

Account No. 4 _____

Username: _____

Password: _____

Credit and Loan Accounts

Account No. 1 _____

Username: _____

Password: _____

Account No. 2 _____

Username: _____

Password: _____

Account No. 3 _____

Username: _____

Password: _____

Account No. 4 _____

Username: _____

Password: _____

Account No. 5 _____

Username: _____

Password: _____

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Important Contacts

Attorney: _____

Financial Planner: _____

Primary Physician: _____

Church/Temple: _____

Pets

I have the following pets and have made the following arrangements regarding their care:

Legal Documents

Printed and executed copies of my will, living will, durable power of attorney and other important documents are located _____.

_____ has durable power of attorney and authority to make health care choices.

Other Financial and Business Interests

I own an interest in the following business(es):

Name: _____

Contact: _____

Name: _____

Contact: _____

Name: _____

Contact: _____

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Home Safe

The home safe is located in the _____. The key is in _____. A spare key is in _____.

Funeral Arrangements

Funeral Home: _____

Contact: _____

Specific wishes: _____

Estate Executor: _____

Contact: _____

Trustee: _____

Contact: _____

Documents

I have a safety deposit box at: _____

My will and other legal documents are located: _____

My Social Security Card and Birth Certificate are located: _____

Signed: _____

Date: _____