|  |  |  |
| --- | --- | --- |
|  |  |  |
|  | **Name** |       |
|  |  |  |
|  | **Date** |       |

****

**A LETTER TO MY FAMILY**

**Where are my important items?**

|  |
| --- |
| **Safety Deposit Box or offsite storage (and key) location:**       |
| **Bank(s) information:**       |
| **Credit Card(s) information:**       |
| **Insurance policies:**       |
| **Outstanding loans and debts:**       |
| **Personal Documents – Birth, Marriage, Divorce, Prenuptial:**       |
| **My Will / Power(s) of Attorney / Living Will / Personal Representative / Trusts / Cemetery deed:**       |
| **My property – deeds and mortgage, auto title(s):**       |
| **Valuables – jewelry, collectibles, stock certificates, savings bonds, CD’s, appraisals:**       |

**Who are my professional advisors?**

|  |
| --- |
| **Financial & Investment Advisor:**      |
| **Life Insurance Agent****:**      |
| **Attorney:**      |
| **Accountant****:**      |
| **Property Insurance Agent****:**      |
| **Primary Physician & Dentist:**      |
| **Employer Contact:**      |
| **Personal Banker****:**      |
| **Business/Investment Partner(s)****:**      |

**What are my funeral preferences?**

|  |
| --- |
| **Funeral home / Cremation:**      |
| **Funeral details – plot location, special music or readings, clergy, pallbearers, memorials, or donations:**       |
| **Organ donation (must make arrangements while living):**      |
| **Obituary information/suggestions:**      |
| **Friends & relatives, you should remember to contact (include phone, email)****:**      |

**What about the items in my house?**

|  |
| --- |
| **How should it be divided? (Specific bequests should be put in writing)**        |
| **My donation preference for the balance**       |

**What about arrangements for the pet(s)?**

|  |
| --- |
| **Who should receive them?**       |

**What about my electronic files and correspondence?**

|  |
| --- |
| **Email and social accounts (usernames, passwords, security questions)**        |
| **Online banking and bill paying accounts and passwords**       |
| **Who should have access to my computer?**       |

**Additional Comments:**

|  |
| --- |
|       |

**Nelson Murphy Insurance & Investments**

***∙ Life ∙ Disability ∙ Long Term Care ∙ Investments ∙ Retirement Plans ∙ 401k Rollovers ∙ Estate Planning ∙***

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***\*This is intended to be a guide for your family, not a legal document. It does not take the place of a will or trust. \****

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