



Letter of Instruction Checklist

PLEASE NOTE: This Letter is not a legal document and anything contained in it will not have the force of law behind it. It will not supersede your Last Will & Testament.

This checklist is meant to be instructional in helping you to write a final letter to your loved ones. It can be helpful to include details about your desired funeral wishes, financial matters, and other final comments. There is no set format for this letter; it is simply a letter you are writing to your loved ones.

- Burial Instructions
 - Details of your wishes and any pre-existing arrangements that you have made.
 - You can direct what you would like to have happen to your remains (cremated with ashes scattered or interred, burial in a specific cemetery, organ donation, celebration of life, etc.)
 - You can specify people to be involved (eulogy, pallbearers, etc.) in the memorial service
 - You can specify song choices for the memorial service
 - You can specify readings at the memorial service
 - You can specify a memorial gift or charity in lieu of flowers
- Personal Information that will be required for the funeral director and death certificate:
 - Full legal name
 - Residence
 - Marital Status with spouse's name
 - Date of Birth
 - Birthplace
 - Parents' names and birthplaces
 - Military history
 - Social Security Number
 - Occupation and employer
 - Next of kin's address and birthplace
- Legal Document Locations/Attorney's contact information
 - Last Will & Testament
 - Powers of Attorney
 - Trust Documents
 - Living Will
 - Prenuptial agreement
- Personal Financial Information
 - We provide a separate Personal Financial Information Sheet we encourage you to fill out.
 - Safe Deposit Box with number, location, location of the key, and contents
 - Bank accounts (checking, savings) with contact information of co-signers on each account



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- P.O. Box with location and the location of the key/combination
- Deeds for any real estate
- Business Ownership Interests and paperwork
- Tax Returns/CPA or Tax Preparer contact information
- Investment Statements/Name of your financial advisor (stocks, bonds, mutual funds)
- Loans, debts, and liabilities (mortgages, credit card debt, car loan, etc.)
- Any valuables located in the home (cash, jewelry, collectible items)
- Monthly obligations (magazine/newspaper subscriptions, prescriptions, utilities)
- Computer/phone/other device/social media/other online account usernames and passwords
- Expected Death Benefits
 - Life Insurance with company name and policy numbers
 - Retirement/pension plans and accounts
 - VA Benefits
- Obituary Information
 - Any items you would like to have included in your obituary (you can even write your own in advance).
- Special Wishes
 - Information for your survivors (such as why one child received a larger inheritance than another due to a loan you had given them).
 - Instructions on the care of a pet
 - Family members, friends, and religious/fraternal/other civic organizations that should be alerted to your passing
- Personal Property
 - While your Last Will & Testament will ultimately control who receives what property, you can use this letter to fine tune and recommend certain items go to specific individuals.
 - This should not be used for large assets, but can be invaluable for eliminating strife over sentimental items.
- Sign and Date the Letter
 - Update the letter
 - For privacy and security reasons, the Law Office of Patrick Sullivan, P.C. can hold your letter with your will if you so choose