

## Sample Letter to the Personal Representative

Providing instructions to your Personal Representative (a.k.a Executor in other states) will increase the accuracy and efficiency of processing your final affairs. The following are topics you may wish to provide instruction, wishes, or other details to aid your PR.

**Personal Data:** the following information may be helpful to your PR as they handle your final affairs:

- dates of: birth, marriage(s), divorce(s), death of spouse/partner
- Social Security Number
- Religious affiliation, name and contact of spiritual advisor
- Educational achievements, degrees held, honors earned
- family tree with names, locations, dates of birth and death

**People:** provide current contact information (address, cell phone, email) for the people in your life that should be notified in general as well as though who may be able to assist your PR. Specifically:

- relatives and close family friends
- person(s) with a spare key to your home, office, vehicle
- childcare providers, school office, children's extracurricular programs
- pet sitter, veterinarian, animal boarding facility
- housekeeping, lawn company, snow removal team
- employer, co-workers, business associates
- accountant, financial planner, insurance agent, banker

**Pets:** list information that will assist in the daily care and re-homing of your pet(s). For example:

- type of food and source (online delivery, prescription, etc), frequency of feeding, etc
- medical treatments
- groomer
- allergies or summary of health issues
- who can take emergency care of the animal(s)
- suggestions for long-term or permanent placement of the animal(s)

**Professional duties:** what information will help your PR address professional duties that need to be resolved.

- contact information for all organizations that have issued you a professional license or other authority (lawyers, doctors, pharmacist, educator, dentist, accountant, etc.)
- list of professional insurances you carry (malpractice for example)
- information on location of banking or financial assets associated with your professional role
- list of membership or accounts associated with your professional duties (Linked In, Google +, Twitter, Facebook, etc.)

**Assets:** The job of your PR will be to gather all of your assets and determine if the asset is “probate”, meaning it has no co-owner or named beneficiary allowing your will to distribute the asset, or if it is a “non-probate” asset, which is an asset that will pass directly to the named beneficiary. It is wise to have the location and contact information for the assets you may own:

- Checking account(s)
- Saving account(s)
- Money Market accounts
- Certificate of Deposits
- Life Insurance policy
- Disability Insurance if it has a death benefit
- Digital currency and where it is held
- Business formation documents, such as LLC, LLP or S-Corp agreements
- Brokerage Accounts
- Retirement Accounts (IRA, 401K, etc)
- Pensions plans with a death benefit
- Deeds to your home, cabin, farm, etc.
- Title to your vehicle(s) and or boats
- Long-term care insurance with a death benefit
- Custodial or UTMA accounts set up by you for minor children
- 529 plans or other college specific saving vehicles
- Royalties for published works
- Health Savings Accounts
- Stocks
- Savings Bonds
- Valuable hobby or professional equipment
- Contents of a safe deposit box (i.e. valuable coin collection)

**Liabilities:** Your PR will also need to locate and notify each liability you maintain. It is wise to keep documentation and contact information for:

- mortgage
- vehicle loans
- student loans
- credit card debt
- home equity line of credit
- loans against retirement accounts
- personal loans

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