

**TESTAMENTARY LETTER**

The purpose of this letter is to state my final wishes and to provide you with valuable information you will need to finalize my estate. Although legally binding documents exist regarding my estate, this letter will give you specific information not contained within those documents. I hope that the contents of this letter will help you carry out my wishes.

TO:

\_\_\_\_\_

Family Member's Names

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**LaBrecque + Associates**  
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## WHO YOU SHOULD CONTACT

Listed below are the names, phone numbers, email addresses and addresses of individuals that can assist with my estate. You should contact them as soon as possible.

Family & Friends

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Clergy

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Funeral Director

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Attorney

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Life Insurance Agent

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Employer/  
Business Associate(s)

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Financial Advisor(s)

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## WHERE IMPORTANT DOCUMENTS & FINANCIAL INFORMATION IS LOCATED

### Where the valuable papers are:

- Will \_\_\_\_\_
- Trust \_\_\_\_\_
- Birth Certificate \_\_\_\_\_
- Marriage Certificate \_\_\_\_\_
- Original Social Security Card \_\_\_\_\_
- Insurance Policies \_\_\_\_\_
- Deeds \_\_\_\_\_
- Bank Accounts \_\_\_\_\_
- PINs to Accounts \_\_\_\_\_
- Credit Card Accounts \_\_\_\_\_
- Tax Returns \_\_\_\_\_
- Stock Certificates \_\_\_\_\_

### Where monetary assets are:

- Safe Deposit Box (and keys) \_\_\_\_\_
- Safe (combination or key location) \_\_\_\_\_
- Mutual Funds \_\_\_\_\_
- Brokerage Accounts \_\_\_\_\_
- Insurance Policies (and beneficiaries) \_\_\_\_\_
- Retirement Plans (and beneficiaries) \_\_\_\_\_
- IRAs (and beneficiaries) \_\_\_\_\_
- Annuities (and beneficiaries) \_\_\_\_\_
- Debts \_\_\_\_\_

# ACCOUNT PINS AND PASSWORDS

**Account/  
Institution Name:**

**Login Name  
and or Account #:**

**Password/PIN #:**

Bank

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Investment Accounts

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Personal Computer Accounts

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Other

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

## HOW YOU SHOULD ADMINISTER MY ESTATE

Remember that I have the listed formal legal documents which are legally binding and direct the administration of my estate. The specifics outlined below describe my wishes in greater detail.

I would like my trustee (formally named in my trust) to consider these wishes when paying out assets of the trust:

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I direct that you compensate my trustee and or other representative in the following way:

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I would like you and my representatives to use advisors listed on page 2.

Finally, I want to explain why I have made some of the decisions I have regarding my estate and named representatives.

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Dated:

Regards,

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