



LAST WISHES

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
5480 Corporate Drive, #100
Troy, Michigan 48098

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WHO I WOULD LIKE YOU TO CONTACT

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

Family & Friends

Clergy

Funeral Director

Attorney

Life Insurance Agent

Employer/Business Associate(s)

Financial Advisor(s)

When making final funeral and burial arrangements please do the following:

Empty rounded rectangular box for funeral and burial arrangements.

Here are my specific wishes regarding organ donation:

Empty rounded rectangular box for organ donation wishes.

The following is a list of specific personal property and my wishes regarding each item (for items of great value I have included the original cost and date of purchase):

Empty rounded rectangular box for listing personal property and wishes.

WHERE YOU CAN FIND IMPORTANT DOCUMENTS & FINANCIAL INFORMATION

Location of Valuable Papers:

- 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 _____

Location of Monetary Assets:

- 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/
Institution Name:**

**Log In Name and or
Account Number:**

**Location of
Password/PIN #:**

Bank

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

Investment Accounts

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

Personal Computer Accounts

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

Other

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

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

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

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

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

Dated:

Regards,

ADDITIONAL INFORMATION

A large, empty rectangular box with rounded corners, intended for providing additional information. The box is currently blank.



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