

Date: [Insert Date]

To: My Family, Business Partners, and Executors

Subject: Letter of Instruction Regarding Business Continuity and Personal Estate

This letter provides essential information to assist you in managing my business affairs and personal estate in the event of my death or incapacity. This document is not a formal will, but a guide to my wishes and the location of critical assets.

1. Professional Contacts

- **Attorney:** [Name, Firm, Phone Number]
- **Accountant/CPA:** [Name, Firm, Phone Number]
- **Financial Advisor:** [Name, Firm, Phone Number]
- **Insurance Broker:** [Name, Firm, Phone Number]

2. Business Continuity Instructions

Business Name: [Insert Business Name]

Key Personnel: In my absence, please contact [Name/Position] for operational decisions.

Succession Plan: [Briefly describe if the business should be sold, liquidated, or handed over to a specific successor].

Location of Business Documents: [e.g., Safe in office, Digital folder link, Lawyer's office].

Banking: Business accounts are held at [Bank Name] under account number [Last 4 digits].

3. Personal Estate and Financial Assets

Legal Documents: My Will, Trust, and Power of Attorney are located at [Physical Location].

Bank Accounts: [List Banks and account types].

Investment Accounts: [List Brokerages].

Insurance Policies: [List Life, Disability, and Buy-Sell Policy details and locations].

4. Digital Access

Password Manager: [Provide name of service or location of master key/emergency kit].

Primary Email: [Email Address]

Devices: Access codes for computer and phone are located at [Location].

5. Final Wishes and Immediate Actions

Immediate Concerns: [List specific urgent tasks, e.g., payroll for employees, mortgage payments].

Funeral/Memorial Wishes: [Briefly state preferences].

Thank you for handling these matters with care. I have full confidence in your judgment.

Sincerely,

[Your Printed Name]