# Letter of Instruction to Executor

**Date:** [Date]

**To:** [Name of Executor]
**Address:** [Address of Executor]

**Subject:** Instructions for Estate Administration

Dear [Name of Executor],

This letter provides instructions and essential information to assist you in your role as the Executor of my estate. This document is not my Will, but a guide to facilitate the administration process.

## 1. Immediate Actions and Funeral Arrangements

Upon my passing, please note the following wishes:

- **Funeral Home:** [Name and Contact Info]
- **Service Preference:** [Burial/Cremation/Religious Preferences]
- **Location of Pre-paid Plans:** [Location or "None"]
- **Organ Donation:** [Yes/No/Specific Instructions]

## 2. Location of Important Documents

The originals or copies of the following documents are located at: [Physical Location/Safe Deposit Box Info]

- Original Last Will and Testament
- Birth Certificate and Social Security Card
- Marriage/Divorce Records
- Deeds to Real Estate
- Vehicle Titles
- Insurance Policies (Life, Health, Property)
- Tax Returns for the last 3 years

## 3. Professional Contacts

Please contact these individuals for assistance with the estate:

- **Attorney:** [Name and Phone Number]
- **Accountant:** [Name and Phone Number]
- **Financial Advisor:** [Name and Phone Number]

## 4. Financial Accounts and Assets

The following is a list of my primary financial holdings:

- **Bank Accounts:** [Bank Names and Account Types]
- **Investment Accounts:** [Brokerage Names]
- **Retirement Accounts:** [401k/IRA Providers]
- **Safety Deposit Box:** [Bank Name and Key Location]

## 5. Digital Assets and Accounts

Instructions for accessing digital information:

- **Computer/Phone Passcodes:** [Location of Password Manager or List]
- **Email Accounts:** [Primary Email Address]
- **Social Media:** [Instructions for Memorializing or Deleting]

## 6. Liabilities and Debts

Regular bills and outstanding debts include:

- **Mortgage/Rent:** [Lender Name]
- **Utilities:** [Company Names]
- **Credit Cards:** [Issuing Banks]

## 7. Distribution of Personal Effects

In addition to the Will, I have attached a "Personal Property Memorandum" detailing who should receive specific sentimental items. Please refer to that list.

## 8. Closing Remarks

I appreciate your willingness to serve in this capacity. Please work closely with my legal counsel to ensure all probate requirements and tax obligations are met.

Sincerely,

[Your Signature]
[Your Printed Name]