Date: [Insert Date]

To: [Name of Agent/Attorney-in-Fact]
Address: [Insert Address]

RE: Letter of Instruction for Execution of Durable Financial Power of Attorney

Dear [Name of Agent],

Attached to this letter is a copy of my Durable Financial Power of Attorney, in which I have designated you as my Agent. This letter provides instructions regarding when and how I expect you to exercise the authority granted to you.

1. Commencement of Authority
Unless specified as "Immediate" in the formal document, it is my intent that you only act on my behalf if I am declared incapacitated by my attending physician or if I provide you with written authorization to begin managing my affairs.

2. Financial Priorities
In managing my finances, please prioritize the following:
- Payment of my mortgage/rent and utilities.
- Maintenance of my health insurance premiums and medical costs.
- Care and expenses for my dependents (if applicable).
- Maintenance of my primary residence in its current condition.

3. Location of Important Records
To assist you in your duties, my financial records are located at:
[Insert Location, e.g., File cabinet in home office, Safe deposit box, etc.]

4. Professional Contacts
You should consult with my professional advisors as needed:
- **Accountant:** [Name and Phone]
- **Attorney:** [Name and Phone]
- **Financial Advisor:** [Name and Phone]

5. Reporting and Transparency
I request that you keep detailed records of all transactions made on my behalf. Please provide a summary of accounts annually to [Name of Family Member or Third Party], if I am unable to review them myself.

6. Compensation
As stated in the Power of Attorney document, you are entitled to [reimbursement for expenses only / a reasonable fee / no compensation] for your services.

By accepting the role of Agent, you are taking on a fiduciary duty to act in my best interest. Please sign below to acknowledge that you have received these instructions.

Sincerely,

[Your Signature]
[Your Printed Name]

Acknowledgment:

I, [Name of Agent], acknowledge receipt of this letter and the associated Power of Attorney document.

_____
[Agent Signature]

_____
[Date]