

Love Letter to My Family

From _____
(Effective _____, 20__)

Dear Family,

In an attempt to simplify matters for you, I have written this letter to provide you with information that will be necessary for you when the time arises. A separate document, For Power of Attorney, provides details regarding financial matters and personal papers. That document is with my Power of Attorney, as listed below.

I have appointed) the following persons to act on my behalf if I become disabled:

Power of Attorney over my Assets:

1st _____ 2nd _____ 3rd _____

Contact Information:

1st _____ 2nd _____ 3rd _____

Power of Attorney for Medical Decisions:

1st _____ 2nd _____ 3rd _____

Contact Information:

1st _____ 2nd _____ 3rd _____

Guardian over my Property:

1st _____ 2nd _____ 3rd _____

Contact Information:

1st _____ 2nd _____ 3rd _____

Guardian over my Person:

1st _____ 2nd _____ 3rd _____

Contact Information:

1st _____ 2nd _____ 3rd _____

It is my desire that the person having the above powers of attorney act on my behalf rather than a guardian being appointed, unless my family believes guardianship is necessary:

In the Event of My Death

I have the following final wishes:

Funeral Home and Location

Cemetery, Plot/Drawer

I have have not prepaid for my burial costs, burial plot, and casket.

Notes: (Anyone to be buried next to? Previous spouses, children or other persons?)

I do do not wish to be cremated. Crematory: _____

Minister/Rabbi to provide the service: _____

Pallbearers: _____

Special Requests

Obituary Reading:

Tombstone Engraving:

Other Special Requests (donations in lieu of flowers, specific music to be played, readings, poetry to be read, and more).

I currently have the following pets: _____.

I ask that _____ take care of my pets for the rest of their lives. They shall receive as a debt of my estate the sum of \$_____ as compensation.

In the event of my death, the following is additional information I think is important for my family and advisors to know:

SECTION FOUR- Family History and Ethical Will

Family History

I was born in _____ on _____, 19 _____

My parents are/were _____ and _____

My maternal grandparents are/were _____ and _____

My paternal grandparents are/were _____ and _____

I have the following brothers and sisters (including step and half-siblings):

_____ Born _____
_____ Born _____
_____ Born _____
_____ Born _____
_____ Born _____

My children are:

_____ Born _____
_____ Born _____
_____ Born _____
_____ Born _____
_____ Born _____

I was adopted and my birth mother and father are/were: _____

I __ have __ do not have detailed information on my family's history. It is located at:

Some important facts about my family history:

Ethical Will

I have have not attached a more detailed Ethical Will.

When I am gone, I hope my family learns from my experiences:

I believe the most important things in life are:

The most important thing I have done in my life is:

How I would like to be remembered:

I have signed this letter this day: _____.

I have signed this Family Love Letter to provide guidance to others regarding my affairs. This document is not intended to replace my will or other estate planning documents signed by me. However, it is my express desire that each family member, Power Holder, Trustee and Guardian will use this Family Love Letter and the other documents signed by me in making any discretionary decisions for me and my family.

Signature _____

Print Name _____

Signature _____

Print Name _____

This may seem daunting at first, but address one thing at a time, taking the time to be thoughtful and thorough about what you desire to happen. You are not alone, Navigate Financial is here to help you. Lean on us while you complete this document, and we will help you along the way.

Copies of this document were delivered to:

I have attached the following documents to my Family Love Letter:

For Power of Attorney letter

a more detailed ethical will