

Estate Planning – Your Family Letter

A good estate plan will include a family letter. This is more personal than a will or other estate documents. This letter may contain many, or all, of the 10 steps shown below:

1. **Estate data:** This will ID family names, your attorney, health and/or financial planner, list of you assets and an overview of your estate choices.
2. **Documents:** This will list important documents and where they can be found. These may be in a safe deposit box, fireproof box at home or kept with your attorney, agent or trusted friend.
3. **Accounts & passwords:** You will need to list all accounts with information on each, Passwords may be included, or directions as to where they are kept, or with what person has access to them.
4. **Family history:** Basic information on your family, including names and background of parents. List all children and key relatives. This may include information on marriages, divorces and blended family relationships,
5. **Care of children, grandchildren or pets:** If you have direct responsibility for any of these, include you plan for their education or development. Estate documents will normally appoint guardians.
6. **Memberships:** You may have memberships in clubs or tickets for various sporting events that may be transferred. By listing your memberships, you can be sure they can be handled.
7. **Care of your body:** When you pass away, your body may be at an assisted living or other related type of place. If you are donating organs, this information is helpful to your family. If you are donating organs, this will be indicated in your health care directives.
8. **Funeral or memorial service:** Your wishes on services and burial method indicated here are important for family members who are planning your funeral or service. If you are a veteran, you may wish for burial at a military cemetery.
9. **Obituary:** Here you should list what you would like to include in your obituary. You may wish to list you principals or values in your obituary.
10. **Final words and blessings:** Conclude with blessing and final words of wisdom for your family. This is an appropriate way to end your family letter.

The above information is included in a book titled **Provide & Protect by A. Charles Schultz**. A copy can be found in the St. James Library.