MILLER
WEALTH MANAGEMENT

Letter of Instruction for ___________________________
Date: _______________

A letter of instruction is an informal document, which complements a Trust/Will, and provides guidance on handling your affairs according to your wishes. Attach additional topics/pages as necessary.

What to do first

1.	Notify the following relatives, friends, financial advisor, tax preparer, trust/estate lawyer:	
2.	Notify employer(s), business partner, assistant:	
3.	Care of pets:	
4.	Notify mortgage holder/ Landlord:	
5.	Request at least 6 death certificates	
6.	Report death to Social Security	
7.	Check on employer/private life insurance benefits	

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8.	Cemetery, Organ donation wishes, Funeral Arrangements	
9.	Notify healthcare providers, health insurance, and volunteer organizations:	
10.	Special wishes and gifts:	
11.	Personal effects guidance:	

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12.	Household and garage effects guidance:	
13.	Notify/cancel accounts, email, etc. Location of "Financial Documents/Asset list":	
14.	Residence and other real estate information: Purchase date and price Improvements (additions to cost basis)	

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