



Life & Money Love Letter

Date _____

Dear _____,

I know that sometimes it seems hard to talk about things because we're so busy, so I've put together this list of things that I'd like you to keep just in case...

Love,

My/our important documents including deeds, insurance information, investment statements, mortgages & other outstanding obligations, titles, and wills, are located _____

My/our safe deposit box is (boxes are) located at _____

The key(s) are located _____

I've selected _____ as my power of attorney
because _____



I've selected _____ as the executor of my will
because _____

My/our attorney's name and contact information are as follows:

Name _____
Address _____

Phone _____
Email _____

You should know that he/she _____

My/our accountant's name and contact information are as follows:

Name _____
Address _____

Phone _____
Email _____



You should know that he/she _____

My/our doctor's name and contact information are as follows:

Name _____

Address _____

Phone _____

Email _____

You should know that he/she _____

My/our doctor's name and contact information are as follows:

Name _____

Address _____

Phone _____

Email _____

You should know that he/she _____



My/our doctor's name and contact information are as follows:

Name _____

Address _____

Phone _____

Email _____

You should know that he/she _____

My/our doctor's name and contact information are as follows:

Name _____

Address _____

Phone _____

Email _____

You should know that he/she _____



My/our investments advisor's name and contact information are as follows:

Name _____

Address _____

Phone _____

Email _____

You should know that he/she _____

My/our investments advisor's name and contact information are as follows:

Name _____

Address _____

Phone _____

Email _____

You should know that he/she _____



My/our handyman's name and contact information are as follows:

Name _____

Address _____

Phone _____

Email _____

You should know that he/she _____

My/our plumber's name and contact information are as follows:

Name _____

Address _____

Phone _____

Email _____

You should know that he/she _____



My/our heating contractor's name and contact information are as follows:

Name _____

Address _____

Phone _____

Email _____

You should know that he/she _____

My/our landscape contractor's name and contact information are as follows:

Name _____

Address _____

Phone _____

Email _____

You should know that he/she _____



Action Steps

If I'm incapacitated there are a few things that will need to be taken care of until I'm able to do them myself.

1.

2.

3.

4.

5.



Bank _____
Website _____

Brokerage _____
Website _____

Email _____
Website _____

Website _____

Website _____

Website _____

Website _____

Linked In _____
Website www.linkedin.com

Facebook _____
Website www.facebook.com

Password information is highly sensitive and should be stored accordingly. Consider a safe-deposit box for this and all other important documents.