

Estate Planning and Wealth Transfer Instructions

Date: [Insert Date]

To: [Recipient's Name]

Address: [Recipient's Address]

Dear [Recipient's Name],

I hope this letter finds you well. As part of my estate planning and wealth transfer process, I wanted to outline my intentions regarding the distribution of my assets and the management of my affairs in the event of my passing.

1. Personal Representative:

I designate [Name of Personal Representative] as my personal representative. They will be responsible for executing my estate plan and managing my assets according to my wishes.

2. Assets Distribution:

Upon my passing, I wish for my assets to be distributed as follows:

- [Asset Description 1] - [Beneficiary's Name]
- [Asset Description 2] - [Beneficiary's Name]
- [Asset Description 3] - [Beneficiary's Name]

3. Trust and Investments:

I have established a trust named [Trust Name], and my investments will be managed by [Investment Manager's Name] according to the attached guidelines.

4. Final Wishes:

If applicable, my final wishes regarding my burial, memorial service, and any personal messages I would like conveyed are as follows:

[Insert Final Wishes]

5. Contact Information:

For any questions or clarifications, please feel free to reach out to me directly at **[Your Phone Number]** or **[Your Email Address]**.

This document is my expression of intent as of the date above and should be reviewed periodically to ensure it reflects my most current wishes.

Thank you for your understanding and support in this matter.

Sincerely,

[Your Name]

[Your Address]

[Your Phone Number]

[Your Email Address]