



Legal Briefs

PLAN FOR THE FUTURE

THE IMPORTANCE OF WILLS AND TRUSTS

If you die without a will or trust, the state in which you live may dictate the distribution of your estate.

LETTER OF INSTRUCTION

A letter of instruction is a guide, not a legal document, but it should be in agreement with your will. This letter can include who to notify at the time of your death, funeral arrangements, the location of important paperwork, and how you wish to distribute personal effects that are not included in your will. This letter can be written or recorded.

ORGANIZE YOUR PERSONAL AND FINANCIAL RECORDS

It is critical to have all of your important papers organized and complete so your family members or executor can easily find them upon your death or serious illness.

MAKE SURE YOUR PERSONAL RECORDS INCLUDE:

- Your full, legal name
- Your Social Security Number
- Your place of residence
- The date and place of your birth
- Names and addresses of your spouse and children
- The location of vehicle ownership certificates and property deeds
- The location of your will or trust
- The location of certificates of birth, marriage, divorce and citizenship
- A lists of your employers and dates of employment
- Your military and education records
- The name of your church and synagogue
- The names and addresses of close friends, relatives, doctors, lawyers and financial advisors
- Membership information for organizations with which you're affiliated
- Your burial preferences and prearrangement plans.

MAKE SURE YOUR FINANCIAL RECORDS INCLUDE:

- Your sources of income and assets
- Your Social Security benefit and Medicare information
- Your insurance information, including policy numbers for health, life, and property policies
- Your bank account information (checking, savings, credit union and IRA account locations and numbers)
- The location of your safe deposit boxes and a list of their contents
- Financial liability information (who is owed, the amount owed and the payment schedule)
- Credit and charge account information
- Property tax information
- The location of valuable personal items, such as jewelry and family treasures
- A power of attorney, durable power of attorney, or living will.

If you have any questions concerning these matters, please call the Office of the Staff Judge Advocate at 317-247-3449 between the hours of 8:00AM and 4:00PM Monday-Friday.
