
Executor Instructions

Name & Address of Executor:

Date:

RE: ESTATE INSTRUCTIONS AND INFORMATION

Dear _____;

I am writing this letter to you as Executor/Executrix of my will to provide you with some instructions about my affairs and about the location of my assets, etc.

In the event of my death, you should immediately contact the following persons;

NAMES

ADDRESSES

_____	_____
_____	_____
_____	_____
_____	_____

I provide the following instructions with regard to my funeral and burial:

The names and address of all the persons who are provided for in my Will are as follows:

Continued on next page...



Steven W. Tarta, Esq.
700 Godwin Avenue, Suite 330
Midland Park, NJ 07432

Tel: (201) 444-8448
Fax: (201) 444-2116

NAMES

ADDRESSES

_____	_____
_____	_____
_____	_____
_____	_____

I have the following policies of life insurance upon my life:

COMPANY

POLICY NUMBER

BENEFICIARY

_____	_____	_____
_____	_____	_____
_____	_____	_____

I own the following pension programs, which are payable to the following beneficiaries:

PROGRAM

BENEFICIARY

_____	_____
_____	_____

Further information about these pension programs can be obtained from my employer(s) or insurance broker(s):

My pension plans and my life insurance policies are located in the following place(s):

Continued on next page...



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My insurance broker is: _____

During the past year I have received income from the following sources:

My W-2 Form can be obtained from the following individuals:

My Federal Income Tax Returns for the past seven years were prepared by:

A copy of these Returns can be found in the following place(s):

I own the following credit cards and charge accounts:

CREDIT CARD	ACCOUNT #
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I additionally owe the following amounts to the following person(s):

NAME	ADDRESS	DEBT AMOUNT
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>
<hr/>	<hr/>	<hr/>

I own the following bank accounts:

BANK	ACCOUNT #
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>
<hr/>	<hr/>

The bank books for these accounts can be found in the following place(s):

I own the following stocks, bonds, and other securities:

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NAME OF STOCK

SHARES

BROKER

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

These items can be found in the following place(s):

My Will can be found in the following place(s):

At the time of my writing this letter I own the following real estate:

LOCATION

EST. VALUE

_____	_____
_____	_____

The dates and title information on this real estate are located in the following place(s):

The following mortgages are owed on this real estate:

Continued on next page...



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MORTGAGE

PROPERTY

AMOUNT

_____	_____	_____
_____	_____	_____
_____	_____	_____

The mortgage installments and payment receipts are located with my personal papers in the following place(s):

I own a safe deposit box. The box number is: _____. It is located in the _____ bank, which is located at _____. The key to my safe deposit box is located _____.

All of my bank statements, cancelled checks, and any other records of payments of bills, and personal papers not listed elsewhere in this letter are located in the following place(s):

Additional information that might be helpful is:



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