

FORM INSTRUCTIONS

EXECUTIVE SUMMARY

Your Legacy Box has everything your family will need. Make sure they know how to use it.

The executive summary form should be the first thing your family sees when they open this box after you're gone. Use this form to write any last-minute instructions or clarifications. Then, list the contact information for your team of professionals.

FUNERAL INSTRUCTIONS

Preplan everything. Just don't prepay for anything.

The days after your death may be the most stressful period of your family's life. Don't add to that stress by leaving them in the dark about your funeral wishes. Go ahead and outline exactly what you want, where you want to be buried, what kind of service you'd like, etc. Just don't prepay for any of it; the rate of return on that investment is just the inflation rate between now and then, and you can do better in other investments.

SAFE DEPOSIT LOG

You want to protect your documents and valuables, not hide them.

A safe deposit box is a great way to keep your precious documents, records and valuables safe. But if your loved ones don't know what's in the box, you could leave them in an even more stressful, panicked state after your gone. Use this form to keep a current breakdown of everything you've locked away for safety, and be sure to include the location of the key and the name and address of the bank.

RENTAL PROPERTY SUMMARY

You've worked hard to build wealth. Now, be sure to keep your house(s) in order.

Rental real estate is a fantastic investment, but it is much more complicated to manage than retirement accounts and mutual funds. Use this form to record the relevant information your loved ones will need to follow up with your real estate investments after your gone. You should also leave your family clear instructions about what you want them to do with your properties. A time of grief can be the worst possible time for someone to become a reluctant landlord, so make sure you're on the same page with your heirs.

PASSWORDS AND COMBINATIONS

Your legacy is well-protected. Make sure your loved ones will always have access.

Online passwords have become incredibly important in recent years, and it's important to use unique, impossible-to-guess passwords for every login to protect your sensitive data. Use this form to list your passwords for every website, financial institution, and online account that you use. You can also list any physical safe or lock combinations here, such as a fireproof safe that you keep in your home or office or even your gym locker.

