LARSON

YOUR LEGACY LETTER
A LASTING LEGACY

THE LEGACY LETTER

As stewards of your financial well-being, we understand the profound importance of preparing for life's inevitable transitions. Over the years, we've walked alongside many families, witnessing firsthand the emotional toll and practical challenges which can arise when proper preparations aren't in place.

Coming from this place of empathy and experience, we offer guidance on legacy planning—a deeply personal and necessary endeavor aimed at alleviating unneeded burdens on your loved ones and preserving your cherished memories. While it's crucial to have legal documents established (your Will, Health Care Directive, Power of Attorney, and Trust, etc.), consider including a Legacy Letter.

Common Topics Addressed in Legacy Letters

Sharing of:
- Important memories, reflections on life experiences
- Family stories, history, traditions
- Values, principles, priorities
- Words of insight, wisdom, advice, or admonition

Expression of:
- Love, gratitude, blessing
- Explanation of certain life events, rationale for actions & decisions
- Request for understanding, forgiveness
- Regrets, interest in making amends
- Hopes for the future

How to Use This Document

This interactive PDF template is designed to provide your family and friends with essential information in an organized and accessible format. With fillable fields, you can easily input and update critical details such as important contacts, funeral arrangements, health insurance information, and a list of valuable items. By completing this legacy letter, you can help ensure that your loved ones have all the answers at their fingertips during a challenging time, offering them clarity and peace of mind. Simply fill in the relevant sections, save the document, and share it with your loved ones to keep them informed and prepared. Make sure to review and update this regularly and consider sharing it with your Estate Planning Attorney and Larson Advisor.

Important Contacts

In the event of my passing, please first contact my primary contact.
My primary contact is / is not responsible for notifying secondary contacts.

Indicate one: ______________________________

Contact Order	Name	Phone Number	Email Address	Physical Address
Ex: Primary	*Mary Smith*	*(555) 434-4252*	*mary.smith@email.com*	*456 Main St, Elkins, WV 26241*
Primary				
Executor				
1st Secondary				
2nd Secondary				
3rd Secondary				

Logins and Passwords for Digital Accounts

Account/System	Username	Password
Ex: Gmail Account	*gwhawkins1956@gmail.com*	*123Password!*
Computer		
Phone		
Email		
Facebook		
Twitter		

Funeral Arrangements

Type of Disposition	☐ Burial ☐ Cremation ☐ Green Burial (Eco-Friendly) ☐ Burial at Sea ☐ Anatomical Donation (Ending in Cremation)
	Details:
Choose the style of gathering, service, ceremony or memorial	☐ Visitation, viewing, wake, or rosary ☐ Private family or public viewing ☐ Wake at home or visitation at the funeral home ☐ Celebration of life service ☐ Traditional funeral service ☐ Body present ☐ Casket open or closed ☐ Graveside service or a service at the crematory ☐ Memorial service (after burial or cremation) ☐ Green or eco-friendly funeral service ☐ Scattering ceremony ☐ Family gathering ☐ Reception or fellowship meal
	Details:

Personalize Your Event	☐ Choose a location reflecting your personal interests (example: favorite park, golf course, near a body of water, art gallery, etc.) ☐ Who do you want to speak at your funeral? ☐ Who are you designating as your personal attendants (pallbearers, eulogist, assistants, etc.)? ☐ Catered or potluck meal ☐ Readings (prayers, poems, etc.) ☐ Songs or hymns, performed live or recorded ☐ Videos or presentations with special music ☐ Memorial, monument, or virtual memorials, such as a grave marker, headstone, video tribute, or memorial website ☐ Contributions to charity organizations
	Details:
Final Resting Place	☐ Cemetery or on private property ☐ Scattering of cremains at sea, in a park, on private property, or in a memorial garden (with permission of local municipality) ☐ Keepsakes, such as cremation jewelry
	Details:
Method of Payment	☐ If prearranging your funeral, some funeral homes offer a guarantee of their current prices, or you can opt to use a funeral trust or pay-on-death account. ☐ If paying for services at the time of need, consider asking family or friends to assist with different aspects, or to contribute by bringing food or sending flowers.
	Details:

Personal Papers

Document	Where Located
Ex: The Smith Family Trust	*Fire-safe locking cabinet in personal office*
Birth Certificate	
Marriage Certificate	
Will	
Trust Documents	
Diplomas	
Social Security Card	
Passport	
Military Records	
Divorce Decree	
Other	

Bank and Credit Card Accounts

Institution	Location/Address	Type of Account	Account Number
Ex: Wells Fargo	*123 Main Street*	*Checking Account*	*999-99999999*

☐ **I do / do not have a safety deposit box.**

It is located: ______________________________

Insurance Policies

Type of Insurance	Company	Policy Number	Location of Policy	Agent's Name and Contact Info
Ex: Life Insurance	*State Farm*	*999-99999999*	*Fire-safe locking cabinet in personal office.*	*Lewis Clark*

Deeds and Mortgage Papers

Property Address	Type of Property	Location of Deed/Mortgage Papers
Ex: 123 West Dr, Green Lake, MN, 55555	*Summer Cabin*	*Fire-safe locking cabinet in personal office.*

Vehicle Information

Vehicle	License Plate	Registration	Vehicle Location
Ex: Toyota Highlander	*CBA-276*	*Due July 15th*	*Storage*

Tax and CPA Information

Tax	When Due	Amount Last Paid	When Paid
Ex: Property (MN)	*May 15 and Oct 15*	*$1500.00*	*May 10*
Federal			
State			
Property			

CPA Name	CPA Agency/Firm	Phone Number	Email Address
Ex: Jane Smith	*Larson Tax Partners*	*(314) 384-8840*	*Jane.Smith@Larson.com*

Investments Accounts

Type of Account	Account Number	Custodian	Financial Advisor	Financial Firm
Ex: ROTH	*999-99999999*	*Schwab*	*John Smith*	*Larson Financial Group*
IRA				
ROTH				
529				
401(k)				
HSA				
Pension				
Etc.				

Valuables

Item	Location	Intended For
Ex: China Set	*Dining Room Hutch*	*Niece Suzie Doe*
Her Engagement Ring		
Her Wedding Ring		
His Wedding Ring		
Painting in Living Room		
Grandma's Cookbook		
Etc.		

Outstanding Debts

Entity Owed	For What	Outstanding Debt	Payment Frequency	Amount
Ex: Credit Union	*Toyota Highlander*	*$19,575*	*Monthly on the 15th*	*$325.00*

Special Survivor Benefits

Agency/Association	Specific Benefit	Contact Name	Contact Info
Ex: Veteran's Association	*Disability Compensation*	*George Smith*	*(555) 756-9413*

My Personal Message