

Estate Planning Pitfall

You Didn't Make Specific References In A Letter Of Instruction

A letter of instruction provides insights into the management of your affairs after your death. But the letter won't be of much help if it's vaguely written. Thus, you need to include specific references in your letter.

First, some background information. A letter of instruction is an informal document providing your loved ones with vital information about personal and financial matters to be addressed after your death. Be aware that this letter, unlike a valid will, isn't legally binding. However, in addition to identifying the location and nature of your possessions, it enables you to impart your final thoughts and wishes.

For instance, a letter of instruction will typically include particulars about funeral and burial arrangements. This can be helpful information for grieving family members. Specifically, consider mentioning whom you'd like to preside over the service, the setting and musical selections. If you want to be cremated rather than buried, state that in the letter.

However, if you're not specific, your expressions may be misinterpreted. If you indicate only that you wish music to be played at your funeral, your family may choose compositions you wouldn't have approved. Similarly, if you weren't raised in a particular faith, be clear about the religious aspects of the service.

The worst thing you can do is to create uncertainty among family members that could lead to discord. The bottom line: Say exactly what you mean and mean what you say. Of course, there are no guarantees that all your wishes will be fulfilled but writing them plainly in your letter improves the chances.

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