

2

Where the documents live

Not the papers themselves — *where they are*. Be embarrassingly specific: "fireproof box, top shelf of the hall closet, blue folder."

The will & estate papers _____

Birth certificates & passports _____

Deeds, titles & vehicle papers _____

Insurance policies _____

Safe-deposit box & its key _____

This letter (copies live at) _____

3

Accounts and bills

The map, not the balances: which institutions, what kind of account, how each bill gets paid — so nothing quietly gets missed, or shut off.

INSTITUTION & ACCOUNT TYPE

NOTES (WHAT IT'S FOR, HOW IT'S PAID)

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

The autopays come from _____

Rent / mortgage is with _____

4

Insurance and benefits

Policy numbers, and a real human to call. Don't forget benefits through work — group life insurance is the one most often lost.

POLICY & COMPANY

POLICY # & WHO TO CALL

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

5

Digital access

The password manager is the key to everything now. Point to it — don't copy it out.

no passwords on this page

My password manager is _____

Emergency access lives at _____

Main / recovery email _____

Phone plan is with _____

Legacy contact set up on _____

6

The wishes that aren't in the will

Funeral notes, who takes the pets, the keepsakes with a story — the things you'd hate left to a guess. Bullet points beat silence.

The pets go to _____

Their food, meds & vet _____

Still true? Re-read yearly: _____

This letter is a map for the people you love — it isn't a will or legal advice.

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