

I Love You Letter: Final wishes and ethical will

From

Effective date

Caring for your loved ones takes many forms. One important way is to prepare them in case of your incapacitation or death by providing helpful information. You can do this by completing a formal “I Love You Letter.”

To the investor(s):

As uncomfortable as the topic of death can be, it is an inevitable part of life. We can either leave our loved ones to continue without us, scrambling for proper next steps, or we can help prepare them. By completing an “I Love You Letter,” you can provide your heirs with a comprehensive document containing vital information, contacts, and instructions.

What’s in it for you? This document:

1. Confirms that you have proper documentation completed
2. Gives you peace of mind that your heirs will be prepared in case of emergency
3. Ensures your legacy is clearly defined for future generations

What’s in it for your loved ones?

1. Clarity in a time of stress, confusion, and grief
2. Assurance they have what they need to follow your wishes

This “I Love You Letter” is organized in order of urgency to provide your survivors with clear instructions on how to proceed after an emergency. This document outlines your final wishes and your ethical will. To simplify the moments after your death, discuss estate distribution instructions with a trusted advisor. Keep them updated on any changes throughout the years.

To the heir(s):

Grief looks different for every individual. We hope you are coping with this time in whichever way you find most appropriate for yourself. If you are reading this, someone wanted to make things as easy as possible for you by gathering helpful information to guide you through this difficult time.

The sections in this document include:

1. In case of emergency
2. My ethical will
3. Guidance on next steps

You may choose to store this document in a variety of ways:

1. Keep all copies in a locked location that is accessible only by people you fully trust
2. Provide copies only to persons who you are confident can be trusted to maintain the privacy of your information
3. Ensure that any electronic copies of the document are saved only on a secure device or in a secure online location
4. Avoid sharing the document electronically, but if you choose to do so, use appropriate security measures

Above all, this document is designed to consolidate and supplement, not replace or supersede, a legal will or any other estate planning documents. Please see page 5 for guidance on next steps.

Section 1: In case of emergency

In case of my incapacitation or death, please use the information provided in this document to understand my wishes and help guide you through this difficult time.

In the event of my incapacitation

In proper legal documents, such as my Will and Medical Directive, I have appointed the following persons to act on my behalf if I become disabled:

- Power of Attorney for medical decisions:
 - 1st _____
 - 2nd _____
- Power of Attorney over my assets:
 - 1st _____
 - 2nd _____
- Guardian over my person:
 - 1st _____
 - 2nd _____
- Guardian over my property:
 - 1st _____
 - 2nd _____

In the event of my incapacitation, I do / do not want to be kept at home as long as possible.

I think it is also important for my family and advisors to know the following information in the event of my incapacitation:

In the event of my death

My final wishes are:

Funeral Home: _____

- I do / do not want to be cremated.
- I have / have not prepaid for my casket.
- I do / do not want to be interred.

- Cemetery: _____
- Location: _____
- Plot / Drawer #: _____
- I have / have not prepaid for my burial plot.
- I have / have not prepaid my burial costs.
- I wish to be buried next to my deceased relative, _____, who is buried at _____.
- I would / would not like a service to recognize my death and suggest this location:

- Officiant to perform service: _____
- Pallbearers:

Additional information:

- Tombstone engraving:

- Organs for donation: _____
- Obituary reading: _____
- In lieu of flowers, please ask for donations to: _____
- I would like the following music, songs, poetry, etc., at the service:

Other special requests:

- I have the following pet(s): _____
- I ask that _____ take care of my pet(s) and receive the sum of \$ _____ as a debt of my estate for taking care of my pet(s) for the rest of their time.
- I think it is also important for my family to know the following information in the event of my death:

Section 2: My ethical will

An ethical will is a document that shares my values, life lessons, and wishes to family. I have used this space to share more about who I am and what I believe.

My ethical will

I believe the most important things in life are:

I hope to teach my family from the following notable experiences:

I am proud of the following things I have accomplished:

My most valued traditions include:

The charities and causes that mean the most to me include:

I have a commitment to making a legacy gift to the following organizations:

I hope my family uses its inheritance to accomplish:

I want to be remembered as:

Section 3: Guidance on next steps

To simplify this stressful and confusing time for you, I have created a second document that contains critical financial information. I have coordinated distribution instructions with my financial advisor, so please see below for guidance on next steps.

Instructions

Critical financial information can be found in a document titled *I Love You Letter: Heir preparation packet*. As soon as possible, please contact my financial advisor for instructions on how to obtain this document. Their contact information is below.

Financial advisor name: _____

Financial advisor firm: _____

Address: _____

Phone: _____

Email: _____

They have been instructed to give access to the *I Love You Letter: Heir preparation packet* document to the following people:

They have been instructed to:

This document is designed to supplement, not replace or supersede, my will or any other estate planning documents signed by me. I hope that each heir, family member, Power Holder, Executor, Trustee, and Guardians will use this and other documents signed by me in making any decisions for my family and me.

Signature _____

Print name _____

Date _____