

LETTER OF LAST INSTRUCTION

Location: _____ Date: _____

Deliver To:

Full Name / Company: _____

Address: _____

Phone / Email: _____

Account Holder Information:

Full Legal Name: _____

Account Number(s): _____

Bank Name(s): _____

Bank Address(es): _____

Instructions for Final Payments and Holdings:

I hereby provide these Last Instructions regarding the disposition of my assets and funds held by the above account(s), to be followed by my Executor(s), Attorney-in-Fact, or other authorized representative upon my death or incapacity. These instructions include, but are not limited to, the disbursement of final payments, bill payments, transfers of remaining balances, and any other financial matters necessary to close my accounts in accordance with my estate planning documents and applicable laws.

Executor / Agent Information:

Full Name: _____

Relationship to Account Holder: _____

Contact Phone / Email: _____

Authorization and Acknowledgment:

I hereby authorize the Financial Institution(s), Executor(s), and any other designated parties to carry out these instructions without delay or obstruction. This Letter of Last Instruction is intended to supplement my Last Will and Testament and any other estate planning documents. I understand that this document does not replace any legal will or trust instrument but serves as a guide to aid in the proper handling of my financial affairs. I affirm that the information provided herein is accurate to the best of my knowledge and that these instructions shall be binding upon my estate and successors.

Additional Provisions:

1. These instructions authorize payment of any and all debts, expenses, taxes, and funeral costs from my accounts as necessary and appropriate.
2. All actions taken in accordance with these instructions shall be deemed authorized and lawful.
3. Any ambiguity or dispute arising from these instructions shall be resolved in accordance with the laws of the United States and the State of California.
4. This Letter of Last Instruction may be revoked or amended by me at any time by a written notice delivered to the relevant parties.

Signatures:

Account Holder's Signature

Date

NOTICE: This Letter of Last Instruction is intended as a legal document to provide guidance to authorized individuals responsible for carrying out the decedent's final financial affairs. It is recommended that this document be used in conjunction with a valid Last Will and Testament and/or Trust documents. Compliance with these instructions is subject to applicable federal and state laws. If there are conflicts between this document and legally binding instruments, the legally binding instruments shall govern.

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