



LJPR, LLC

Registered Investment Advisor

LETTER OF FINAL INSTRUCTION

The purpose of this letter is to state my final wishes and to provide you with valuable information you will need to finalize my estate. Although legally binding documents exist regarding my estate, this letter will give you specific information not contained within those documents. My intent is to provide you with answers as to the who, what, where, how, and why in order to finalize my estate. I hope that the contents of this letter will help you and more importantly I hope that you will carry out my wishes.

TO:

Important Family Member's Names

LJPR, LLC

4555 Investment Drive, Suite 304

Troy, Michigan 48098

p: 248.641.7400

f: 248.641.7405

WHO YOU SHOULD CONTACT



Listed below are the names, phone numbers, email addresses and addresses of individuals that can assist with my estate. You should contact them as soon as possible:

Family/Friends

Clergy

Funeral Director

Attorney

Life Insurance Agent

Employer/
Business Associate

Financial Advisors

WHERE IMPORTANT DOCUMENTS/ FINANCIAL INFORMATION IS LOCATED

Where the Valuable Papers are:

- Will _____
- Trust _____
- Birth Certificate _____
- Marriage Certificate _____
- Original Social SecurityCard _____
- Insurance Policies _____
- Deeds _____
- Bank Accounts _____
- PINs to Accounts _____
- Credit Card Accounts _____
- Tax Returns _____
- Stock Certificates _____

Where Monetary Assets are:

- Safe Deposit Box (and keys) _____
- Safe (combination or key location) _____
- Mutual Funds _____
- Brokerage Accounts _____
- Insurance Policies (and beneficiaries) _____
- Retirement Plans (and beneficiaries) _____
- IRAs (and beneficiaries) _____
- Annuities (and beneficiaries) _____
- Debts _____



Account/Computer PIN:
(List actual PIN or location of PIN)

Name:

PIN/Location:

Bank(s)

Investment Accounts

Personal Computer Accounts

Other

HOW YOU SHOULD ADMINISTER MY ESTATE

Remember that I have the listed formal legal documents which are legally binding and direct the administration of my estate. The specifics outlined below describe my wishes in greater detail.



I would like my trustee (formally named in my trust) to consider these wishes when paying out assets of the trust:

I direct that you compensate my trustee and or other representative in the following way:

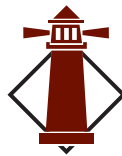
I would like you and my representatives to use the listed advisors.

Finally, I want to explain why I have made some of the decisions I have regarding my estate and named representatives.

Dated: _____

Regards,

Individual's Name



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