Personal Letter of Direction

What is a Personal Letter of Direction? A personal letter of direction is a letter that you write to your loved ones. It contains detailed instructions for distributing your personal property upon your death. You may include burial instructions and other personal instructions as desired.

Why Use Distribution of Personal Property Forms? Your revocable living trust does not provide details for the distribution of your personal property. It instructs your successor trustee to refer to your personal letter of direction for specific guidance.

Signing This Document You simply sign and date your personal letter of direction. You do not need witnesses nor a notary.

PERSONAL LETTER OF DIRECTION

The revocable living trust document you created specifically references your Personal Letter of Direction. In this letter you may spell out any special desires you have regarding the distribution of your personal property. For example, if you have three children and wish one specific child to have a certain item of jewelry, write this down in your personal letter of direction. The following is provided as an introductory paragraph to be used with your personal letter of direction. You may incorporate this introductory paragraph as you deem appropriate for your own letter.

Dear Family and Friends Please use this letter as a guide to distribute the personal property described herein. Also, if I have indicated other personal desires and I expect my successor trustee to honor my wishes, consistent with the terms of this personal letter of direction, whenever possible.