



Direction Memo(TM): How to Write a Letter of Instructions for Your Estate Plan

Paul M Caspersen CFP MS

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Prevent a Breakdown in Continuity of Your Financial Plan by Drafting a Direction Memo™

The important people in your life will benefit tremendously from a Direction Memo--a letter of instruction that goes beyond traditional estate planning documents, which are written to determine who gets what--not what needs to be done. Rather than adding excessive instructions to your will or trust, use a Direction Memo, a logical place for basic yet crucial information and a way to address important questions like these:

*How would my late husband want me to invest his life insurance proceeds? Should I pay off the mortgage or save for my own retirement?

*What would my mother have wanted me to do with her jewelry?

*Which Primary Financial Advisor can I trust now that my husband's gone?

*What happens to my spouse's retirement plan now that they're gone?

*Did Dad want to be cremated?

*Who is the best real estate agent to sell Mom's house now that she is moving to the nursing home?

Do your loved ones a favor. With Direction Memo, you can answer these important questions so that grieving family members won't have to guess.



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