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Directions to My Trustees and/or Agent under Power of Attorney

Below is a form letter of directions with respect to the administration of your personal and financial affairs in the event that you become incapacitated. The administration of finances can be a source of disagreement for families when someone becomes incapacitated. Expressing your wishes in writing can help to reduce the risk of family conflict.

Name:_____

Address:_____

Date:_____

Directions to My Trustees and/or Agent under Power of Attorney

Dear _____:

Purpose and Scope of this Letter

In the event that I become incapacitated, below are my instructions regarding the administration of my personal and financial affairs.

Monthly Living Expenses (mortgage, utilities, etc):

Expense	Amount
	$
_____	$
_____	$
_____	$
_____	$
_____	$
_____	$
	$
	$

Instructions for Gifting

1) If I am incapacitated, I authorize the following gifts to be made on my behalf:

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____.

2) If I am incapacitated, I do not want any gifts to be made.

_____
_____.

Other Personal Wishes Regarding my Care and Finances

_____
_____
_____
_____
_____
_____
_____
_____
_____.