

Running the Play

Love Letter Checklist

This checklist is a companion to your Family Love Letter. It helps organize the practical and personal details your loved ones will need in your absence. This isn't about estate law—it's about love, stewardship, and legacy.

1. Key Contacts & Advisors

- Attorney (Name / Firm / Contact Info)
- Financial Advisor / Planner
- Insurance Agent(s)
- CPA or Tax Professional
- Executor / Trustee / Power of Attorney

2. Important Documents & Accounts

- Will / Trust documents
- Life insurance policies
- Bank, investment, and retirement account information
- Pension / Social Security / Veterans benefits
- Property deeds, titles, mortgage details
- Safe deposit box location and key access
- Passwords / digital vault or password manager access

3. Final Wishes & Personal Messages

- Funeral and burial or cremation preferences
- Obituary information (if desired)
- Special instructions for belongings or family heirlooms
- Personal message to spouse, children, or grandchildren
- Scripture, prayer, or blessing to be shared

4. Faith, Values & Legacy

- Life verses or scriptures that guided you
- Core beliefs and life lessons
- Your testimony or faith journey
- Final words of encouragement or love

Run the play. Take the next step.

“It’s not about you. It’s about them.”