

WORKSHEET 7.1 Letter of Instruction, Attachment A: Persons to Be Notified at Your Death

Provide the following details for each person to be notified at your death.

Relationship codes: Use these to identify each person. Include *all* codes that apply. For example, if the same individual provides the client with legal, tax, and accounting advice, then enter 3, 4, *and* 5.

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|-----------------------|-----------------------|
| 1. Friend | 6. Bank adviser |
| 2. Relative | 7. Investment adviser |
| 3. Legal adviser | 8. Insurance adviser |
| 4. Tax adviser | 9. Financial adviser |
| 5. Accounting adviser | 10. Other |

For relationship codes 7 and 8, use the following letter codes to provide more detail about the type of advice offered. For example, if the same insurance agent provides you with life and health coverage, then enter I and J as the insurance codes for the adviser.

Investment Codes		Insurance Codes	
A Stocks	E Options	I Life	L Property & Casualty
B Bonds	F Real Estate	J Health	M All Coverages
C Mutual funds	G General	K Disability	
D Commodities	H Other		

Name	Firm	Address	Telephone	Relationship Codes
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