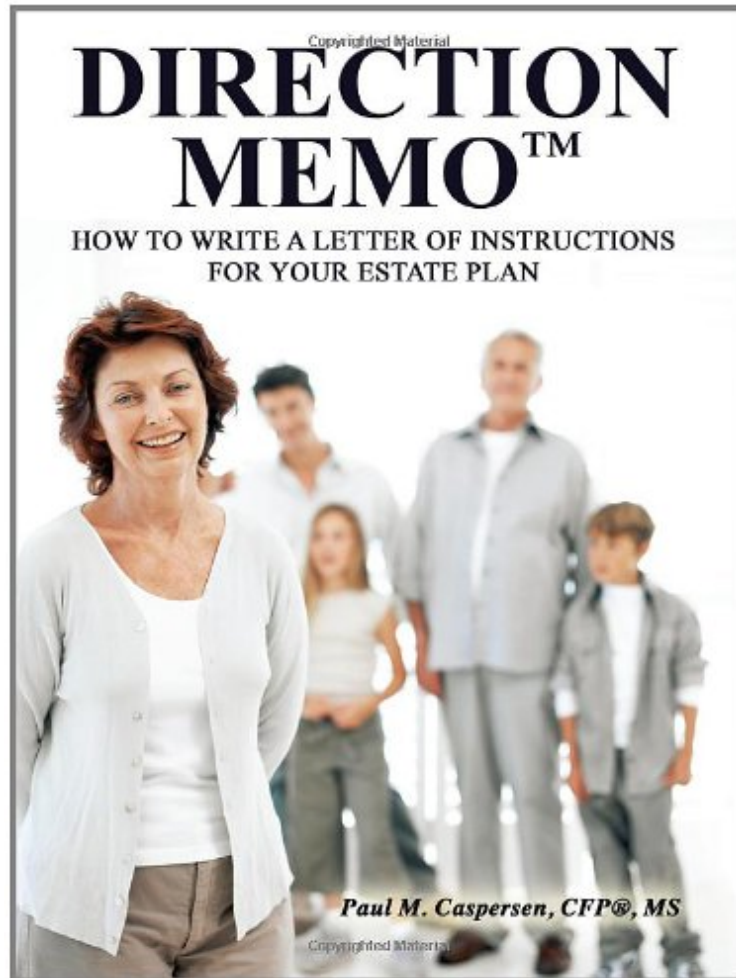


Direction Memo: How to Write a Letter of Instructions for Your Estate Plan

Paul M Caspersen CFP MS
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Paul M Caspersen CFP MS : Direction Memo: How to Write a Letter of Instructions for Your Estate Plan before purchasing it in order to gauge whether or not it would be worth my time, and all praised Direction Memo: How to Write a Letter of Instructions for Your Estate Plan:

3 of 4 people found the following review helpful. Perfect combination of comprehensive easy to use By Brian Weckman This book is by far the easiest and most well-organized guide to creating a letter of instruction for your family. I have been a financial advisor for 15 years and have not found anything that is more usable when demonstrating the concepts involved in estate planning. The beauty of this publication is in its organization. The author has enabled you to cross-reference every topic in the book directly to the form or language you need to include the topic into your personal letter of instruction. All of the desired language is cleanly listed in the workbook section in the

back. It really doesn't get any easier than that. I highly recommend this guide to anyone interested in creating their personal letter of instruction or to any financial advisor that helps clients walk through this difficult process. It has made my life much easier in this area of planning, which is saying a lot. This area of life planning is notoriously tough for people and this book makes it as easy as it can possibly be. It not only provides you with the correct language to use in your document, but makes the decision-making process much easier as it walks you through each item.

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.

About the Author Paul Caspersen brings talent for complex financial thinking to estate planning. He is a pioneer in the field of drafting side Letters of Instruction within the comprehensive estate plan. He works diligently to ensure families have properly executed financial planning documents in addition to the traditional legal documents drafted by an attorney. Caspersen is the author of the book "Direction Memo: How to Write a Letter of Instructions for Your Estate Plan" and his work has been adopted by hundreds of CFPs. Caspersen graduated from the University of Northern Iowa as an undergrad and the College for Financial Planning in Denver with a Masters Degree in Financial Planning. He can be reached at paulcaspersen@hotmail.com