# How to Complete the Letter to My Executor / Executor Guidance Template

This short guide explains how to complete the 'Letter to My Executor' / Executor Guidance template. It is designed to help you leave behind a clear, helpful guide for your executor/s—the person/s responsible for carrying out your wishes after you die.

## 1. What Is This Letter For?

This letter provides your executors (ideally, you’ll have at least two) with a summary of where to find all the key documents and information they’ll need to manage your estate. It complements your will and helps reduce confusion or delay during a difficult time.

## 2. How to Fill It Out

The letter includes several sections covering practical, financial and personal areas. In each space provided, write down where your relevant documents are stored—for example, in a file at home, with a solicitor, or stored digitally.

Examples:

* 'My original will is located: With my solicitor, Smith & Co., in their secure archive.'
* 'Life insurance documents: In my home office filing cabinet, folder marked “Insurance”'
* 'Letters for family: On a USB drive labelled “Messages”, kept in my bedside drawer'

For more detail on each individual section, please follow the section links within [www.notsograve.co.uk](http://www.notsograve.co.uk), where I go into detail on each topic.

N.B. Do NOT include passwords themselves within this letter, though you can state how to gain access to any passwords (for example, by using a password access service, or in a safe that you know the executor or a family member has access to).

## 3. Sign and Date

Add the date and your name at the bottom of the letter. This helps your executors know when it was last updated and confirms the letter’s authenticity.

## 4. Store It Safely

Either give a copy to the executors (ideally you’ll have at least two) and discuss in advance, or keep a printed copy in a safe but accessible location, and let your executor or a trusted loved one know where it is. You may also want to store a digital version on a secure cloud service or encrypted drive.

## 5. Keep It Updated

Review this letter at least once a year or after any major changes—like moving house, switching banks, or updating your will. Update any details that change and replace old copies with the new version.

## Optional Tips:

* Include printed or digital copies of key documents mentioned in the letter.
* Consider giving a copy to your solicitor or storing one with your will.
* Keep your tone calm, clear and helpful - this letter is for someone who may be grieving.