

Direction Memo™ How to Write a Letter of Instruction for Your Estate Plan
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Paul Caspersen joined PGTRAZ for the 2020 Virtual Conference to talk about the importance of and how to write a Letter of Instruction (LOI) for your estate plan. We were thrilled to have Paul join us and share his expertise on this subject because, he literally wrote the book on the topic. “Direction Memo™ - How to Write a Letter of Instruction for Your Estate Plan, is a practical, easy-to-follow workbook style publication that takes a reader through the entire process, from understanding the need for a Letter of Intent to the action steps of creating their own direction memo.

For professionals in the field, whether you are a financial planner or planned giving officer, this is an excellent tool to share with your clients and donors to help them get started. Caspersen answers the question of why it is important to write a Direction Memo(TM) even if they already have their traditional estate planning documents drafted. As he explains in the book, many people come to realize that their estate planning documents are written to determine who gets what, not what needs to be done. And, he helps clarify why most folks wouldn't want to list every specific estate instruction in their binding documents. Direction Memo(TM), is how things should be done not just what should be done with everything from their personal property to their most ardent philanthropic wishes.