



*A Family Love Letter
For You*

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To Our Dearest Clients,

This document is your love letter because it takes the stress and worry from your loved ones about what you own, who to contact, and what to do should anything happen to you.

It lists all of your important financial contacts and accounts.

Please review it at least once per year and update it as needed.

Once it is completed, please send a copy to us here at SeaCure Advisors so that we have it on file in case you should misplace it.

Seacure Advisors

(877) 328-4037

INFO@SEACUREADVISORS.COM

WWW.SEACUREADVISORS.COM

Contacts

Add additional important contacts such as attorneys and business partners at the bottom.

CONTACT TYPE	NAME	COMPANY	PHONE/EMAIL
Estate Attorney			
CPA or Tax Preparer			
Financial Planner			
Insurance Broker/Rep (Health)			
Insurance Broker/Rep (Life)			
Insurance Broker/Rep (Home)			
Insurance Broker/Rep (Auto)			

Incapacitation Action Plan

These are recommended steps to take in the event you become incapacitated

BEFORE:

- Draft a Durable Power of Attorney with an Estate Attorney
- Establish a Health Care Proxy or Directive; ask if your state accepts Living Wills
- Have a Trust and/or Will to direct how you want your assets to be handled
- Identify a Trusted Contact; this could be the same person as your Durable Power of Attorney
- Make sure your Durable Power of Attorney and Trusted Contact know where to find your important documents

DURING (For Trusted Contact or Durable Power of Attorney):

- Contact the Primary Care Physician
- Make sure all health care providers are aware of and have read the Health Care Directive document
- Keep detailed records of everything
- Schedule regular family meetings if possible to keep everyone updated
- Suspend or cancel paid internet accounts



Love Letter Checklist

- Key Contacts
- Financial Accounts
- Insurance
- Liabilities
- Internet Accounts
- Incapacitation Action Plan
- Any other important notes
- Send a copy to SeaCure Advisors
- Review and update at least 1x per year