

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)			



Medical Contacts

Add additional important medical contacts such as specialists at the bottom.

CONTACT TYPE	NAME	COMPANY	PHONE/ EMAIL
Primary Care Physician			
Dentist			



Financial Accounts

Account types can include checking, savings, retirement, investments, and annuities.

ACCOUNT TYPE	ACCOUNT SUB-TYPE	INSTITUION	ACCOUNT NUMBER



Insurance

Account types can include checking, savings, retirement, investments, and annuities.

INSURANCE TYPE	CARRIER	POLICY NUMBER	ACCOUNT NUMBER



Liabilities

Liability types can include mortgage and credit cards.

LIABILITY TYPE	CREDITOR	ACCOUNT NUMBER	CONTACT INFORMATION



Internet Accounts

Please list your online accounts and describe how your loved ones can access your account usernames and passwords, if needed. We recommend keeping your login credentials in a safe and secure place such as a password management app or password-protected digital file.

COMPANY

DESCRIPTION



Incapacitation Action Plan

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

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



Notes



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

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