



**BUSINESS INSIGHT. FINANCIAL PERFORMANCE.**

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Date

## **[Sample Letter of Guidance]**

[On Business Letterhead]

**This Letter of Guidance is a CONFIDENTIAL document to be used only in an emergency.**

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Dear Spouse & Family,

Here are the contact persons and critical items that you may need to operate the business in my absence or untimely death, incapacitation or disability:

1. Corporate Attorney (include Estate Attorney and Tax Attorney)
2. Any Safety Deposit Box Locations and Numbers
3. CPA Contact Name & Firm for the Business (Corporate Taxes)
4. CPA Contact Name & Firm for Personal Taxes (if different than Business)
5. Insurance Brokerage Contacts & Policies in force with Beneficiaries of each.
6. Banking Contacts, Account Numbers and Personal Financial Statement
7. Financial Planner / Wealth Advisor and Brokerage Accounts
8. Here is the person I would recommend as Interim Leader in my absence of the Company. Our Business Advisor is:\_\_\_\_\_ The President of our Advisory Board is:\_\_\_\_\_.
9. Location of any Trust Documents, Buy/Sell Agreements, Partnership Agreements, Operating Agreements, Living Wills, Durable Power of Attorney, or any other critical contractual agreements or supporting documents.
10. Location of any real property, or business investments including deeds and titles; any valuations.
11. Personal Financial Statement.
12. Any electronic Log-on ID's and Passwords for my PC/Laptop and above items.

My Executive Assistant can be reached at: \_\_\_\_\_

Very truly yours,

Signed By: \_\_\_\_\_

Date: \_\_\_\_\_

Print Name: \_\_\_\_\_

Title: \_\_\_\_\_