

Letter introducing the Financial Caretaking Plan to your clients

Dear client,

This is the first questionnaire we will use to create your plan for aging. It takes about 15 to 20 minutes to complete. Please click this link when you are ready to start: *<Put link here>*

The “Financial Caretaking Plan” outlines the steps you have taken to prepare for transferring bill paying, investment management, and estate planning, and the tasks you need to complete to get ready for the day you can no longer manage finances on your own. It will enable us to help you put the pieces in place to prepare for an orderly transition of financial management to your financial caretaker(s).

The questionnaire will ask for the names and contact information of the people who may potentially take care of your finances once you are no longer willing or able. Please list everyone whom you trust who might help. You will also have the opportunity to list their “roles” as part of this exercise.

If a question is confusing or doesn’t seem applicable, please pick the best answer that fits you. We can adjust the report later to reflect your true intentions if needed.

Please let me know your questions and concerns. As soon as I receive notification that you have completed the questionnaire, I will reach out to you.

Best regards,

Adviser

