

Sample Emergency Guidance Letter

Use this file as a template to complete your Emergency Guidance Letter. Once completed, be sure to alert your spouse and/or most trusted employee(s) as to the existence and location of this letter.

Effective Date: _____

Dear (Business Employee/Partner):

This letter is meant to assist you in dealing with important business matters should something have happened to me that prevents me from working with you directly at this time.

(Add any further personal statements that you may wish.)

Advisors:

Some of the people you may need to contact to assist you at this time are:

Advisor Role	Name	Firm	Telephone	Email	Address
Attorney					
Accountant					
Bank					
Business					
Financial					
Insurance – Life/Health					
Insurance – Property					

I have made the following plans for the eventual handling of my ownership interest in the business....

In the event that I have died, or that I am seriously disabled such that I am unable to communicate with you and unlikely to recover anytime soon, my further wishes for the business are:

I suggest that the following steps should be considered in the short term during this important business transition:

Key employees to meet with / any special concerns to address:

Key customers to meet with / any special concerns to address:

Key external partners (lenders, suppliers, etc.) to meet with / any special concerns to address:

Important documents or information that you may need to access and not be familiar with already:

If I have died or may not recover from my disability, I would like to be remembered by the company and team the following ways:

What has been most important to me about this company is.... It is my hope that you will...

Sincerely,

(Your Name)

This document is not intended to replace my will or other estate and legal planning documents executed by me. However, it is my express desire that business team will use this letter in making any discretionary decisions for the business going forward.

Signature

Print Name

WHAT IS NAVIX®?

NAVIX® is a proprietary process that helps business owners plan for and achieve successful exits.

NAVIX® helps owners of closely held businesses plan for and execute successful exits: achieving financial freedom, creating a sustainable legacy, and exiting on their own terms.

NAVIX® was designed out of experience seeing business owners struggle to achieve financial freedom, create a sustainable business legacy, and exit on their own terms. NAVIX® is a dual track process, that prepares both the business and its owner(s) for exit. NAVIX® is not just about planning; we also help clients execute the strategies and tactics needed to achieve a successful exit.

To review your score with someone from the NAVIX® team, or to learn about the NAVIX® program, please visit www.navixconsultants.com.