

## 1) When should you hold your Family Meeting?

You should hold your Family Meeting only after you have made your decisions in the other sections of this book as we noted. Ideally, before the meeting you will have made your decisions in regards to:

- Your housing
- How you intend to fund care costs when the necessity arrives
- Your legal affairs
- Naming your fiduciaries and providing roles and resources to those you name

After you have reached those decisions, congratulations! It means you're ready to schedule the Family Meeting. As you complete the next steps of preparation, aim for scheduling the Family Meeting at a time and place convenient for your loved ones and conducive to an open discussion.

## 2) What should you bring to the Family Meeting?

Have a checklist for your Family Meeting and the decisions that you've recorded in each section of this workbook. For convenience, you can copy these decisions to the Blueprint section of this workbook. Also, be sure to bring copies of your "What It Means to Be Me" worksheet, as well as the relevant legal documents such as Powers of Attorney, Mental Health Advance Directive, and so on.

**NOTE:** We do not recommend giving a copy of your Will to heirs, on the chance that you decide to change your Will in the future.

### 3) Who should attend?

Although every circumstance is unique, we generally recommend including the following people in your Family Meeting:

- Anyone named as a Fiduciary
- Anyone named as a Beneficiary
- Spouses

First and foremost, you should include anyone named as one of your fiduciaries. It is also helpful to invite anyone you've declared as a beneficiary. Additionally, while it may be a decision that requires more consideration, depending on your personal situation we also recommend inviting the spouses of your fiduciaries. You may not be comfortable with some of the spouses of your fiduciaries, which also requires forethought before they

are invited. However, if you decide to invite one spouse, you should invite them all. Alternatively, if you decide to leave out one of the spouses, you should not invite any. By doing this, you are helping to mitigate any drama, arguments, or negative feelings.

We recommend holding the meeting in person as opposed to virtually, if possible. There are two reasons for this. The first is that it can serve as a good indicator of who is or is not dedicated to the position as fiduciary. If one of your fiduciaries is too busy to attend, it may be a good idea to evaluate whether or not that person should remain a fiduciary. The second is that it is easier to gauge your family's reactions, both verbally and physically.

### 4) Who should lead the meeting?

We strongly suggest that a confident, neutral, and experienced third party lead the meeting. The reason is that in our experience, the moment you say you want them to ensure that you do not end up in a nursing home, they will more than likely become defensive. Shocked and offended that you would even consider that

they would do anything to the contrary, they will begin to tune you out and the meeting will be pointless. By having a neutral third party lead the meeting, your family will likely listen to the same information and internalize it differently.

## 5) What should you discuss in the meeting?

We suggest that you be fully transparent with your family and loved ones during the meeting, letting them know your wishes, their roles, and what is expected of them. By communicating with clarity, you help to ensure that there is no confusion about your wishes and their roles when the time comes that you are no longer able to handle your own affairs. It also helps to mitigate any possible feuds.

There is a good chance that you will experience potential push-back from family members who

feel they know what is best for you, regardless of your decisions. Make sure that you are prepared for this conversation, and you have all the details necessary to stave off criticism.

Although we recommend full clarity, we do suggest that you withhold details about your financial reality. By withholding this information, you do not provide your family with expectations of inheritance, which could possibly alter their decision-making as well as your relationship.



Use this page to make any additional notes regarding your Family Meeting.

## Family: Planning Your Meeting

### I have made the following decisions regarding my Family Meeting:

When to hold my Family Meeting: (Date) \_\_\_\_\_

What I should bring: (List items)

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Who should be invited: (List)

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Who should lead: (Name) \_\_\_\_\_

What issues will be discussed: (List items)

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### Additional notes regarding planning my Family Meeting:

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