During Your Family Meeting

At the Family Meeting, have your Family Meeting Checklist in front of you along with your documents. Your moderator should also have a copy of your checklist to guide the meeting.

While there is no definitive outline of what should be discussed in sequence at a Family Meeting, we can provide you with some suggestions. Let's take a look.

Share Your Plans

First of all, this is the time to share your plans—including your long-term goals and objectives. You should outline your reasoning so that your loved ones can follow along and connect the dots between what decisions you are making now, what you'd like them to do, and why.

You should use this opportunity to provide your agents with copies of your Powers of Attorney, then read through them together, especially the parts that are regarding their duties and expectations.

For example, if you have written in a clause that instructs them to work with a specific Geriatric Care Manager and that they should do all they can to have you convalesce in your home, this is a great section to review carefully together.

Let each agent read his or her section out loud so everyone hears the same information in the same space. Then, ask them to interpret what they've read—having them paraphrase what they understood after reading. This helps to alleviate misunderstandings and confirms they know your expectations.

Continue with this method through any other documents and plans that you would like to share with them. Remember to discuss in detail any areas where they will eventually be executing your plan for you. It is important to hear that they understand your intent and wishes.

Review Your Resource Team

Be sure everyone knows of the individuals on your Professional Team. This list may be included as part of your legal documents or you can add it separately. The list includes service professionals such as Financial Planner, Tax Accountant, Property Manager, and so on. Your agents should know how to reach them and when they would need to connect with them.

Your Financial Power of Attorney will need to know where to access checkbooks, bank accounts, bills, etc. This may be a good time to talk through these details so others can be aware, too. Sharing the particulars of how each of the professionals from your list gets paid is important too, so there are no surprises.

This may also be a good opportunity to, at least generally, describe compensation that you've intended for those agents performing Power of Attorney, Trustee, or other responsibilities.

Listen and Get Input!

As you go through your plans, intents, and details together, a very important step is to solicit input and listen with an open mind. Remember that while you are aiming to minimize future burdens on them, your loved ones are processing this information in their own way, including the emotions of imagining future grief, along with pondering the logistics of what you expect of them. Their feedback may very well adjust parts of your plan. Housing plans are prone to adjustment after a Family Meeting. Be sure to review the Housing session, or any other where you may consider adjustments, following your meeting.

Promises and Making Commitments

After you have covered the issues you want to discuss, and before leaving the room, we highly recommend that you take the time to make promises to each other: you, to promise to listen to any concerns of your fiduciaries or loved ones and make amends in plans if necessary; and fiduciaries, to promise what they will or will not do in carrying out your designated plans. If these promises are made in earnest and are kept, then the rest is easier to navigate.

Family: During Your Meeting Checklist

During my Family Meeting, I did the following: (Select all that apply)

- ☐ Shared my plans
- ☐ Reviewed my resource team
- ☐ Listened and got input
- ☐ Made commitments

Notes from my Family Meeting: