

# After Your Family Meeting

Once you've completed your Family Meeting, it is important to follow up on the feedback you've received, and make any necessary changes.

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## Update Your Decisions

After your Family Meeting is concluded, check back in (around three months later) to make sure you and your named agents, as well as family members, are comfortable with the discussion, and inform them of any significant changes you've made. Ask for more feedback from them, if they haven't shared it already. Sometimes, having time to ponder brings up new thoughts, and it is good to hear them even if you don't ultimately make changes.

After your Family Meeting is concluded, contemplate your observations and the feedback you received from those who attended. Do you still feel confident in your choices of fiduciaries? Did anyone seem confused or concerned over the responsibilities you intend to place on them? Make any changes to your plans as necessary and be sure to update them in the applicable section of your *LifePlanning* Blueprint.

**Follow up:** Around three months later, check in on those who participated in your Family Meeting:

1. Make sure you and your named agents, as well as family members, are comfortable with things you discussed
2. Inform them of any significant changes you've made
3. Ask for more feedback from them, if they haven't shared it already

Sometimes, having time to ponder brings up new thoughts. Plus, it is good to inform them of any changes that you've made.



## Update your Legal Documents

If you decide to make any changes to your fiduciaries, beneficiaries or other items listed in your legal documents, make sure to update these with your Attorney. Your documents are legally binding, so your changes need to be made official in your applicable documents.

## Update Providers

You may realize at this point that you need to make adjustments to the professional resource team that you've selected. Maybe a family member has expressed concerns of a responsibility and you prefer to select a professional to handle the task. Whatever you choose, make sure you follow through by having the appropriate resource team.

If you ended up making any changes to legal or other documents, be sure to provide a final copy of them to all appropriate people, including your professional team, if applicable.