



Family meeting: discussion topics

Planning before the meeting

Keeping family members informed of care plans and working together on future planning can ensure that quality of life is maintained for your loved one. Family meetings may help this process, and advanced preparation ensures a smooth meeting. Putting together an agenda or a list of topics can help. This checklist may get the process of preparing an agenda started. Depending on your place in the planning process, many of these items already may be taken care of, while others may need to be addressed at a later time.

- State the purpose of the meeting.
- Describe your loved one's capabilities and needs.
- Recognize caregiving concerns:
 - Sharing of caregiving responsibilities
 - Who has flexibility to help?
 - Who is geographically closest?
 - How do we split up duties?
- Identify projected expenses and lifestyle needs:
 - Medical expenses
 - Personal assistance
 - Assistive devices
 - Transportation
 - Housing
- List income sources now and in the future
 - Earned income/pension
 - Inheritances
 - Government benefits
 - Special needs trust
 - ABLE account
- Determine who has decision-making responsibilities (e.g., financial, medical, hiring a caregiver, etc.).
- Decide on successor guardians, if applicable. Successor guardians should be multi-generational.
- Identify legal instruments that are or will be in place, such as wills, advance directives, powers of attorney and trusts.
- Choose trustees and successor trustees, if a trust is or will be put into place. Trustees and their successors should be multi-generational. A corporate trustee can be a co-trustee to assist with financial decisions and tax preparation.
- Summarize decisions made and schedule the next meeting. After the meeting, provide a written summary of what each person has agreed to, as well as an email or telephone tree for regular updates.