

# Family Conversation Agenda

A calm, practical way to discuss roles before anyone is in a crisis

Educational planning resource - not legal, tax, financial, or medical advice. Laws and terminology vary by state. Use this guide to organize your thinking and bring informed questions to qualified professionals.

## Suggested opening

**"Nothing is wrong. I am doing this while I am healthy and able to make thoughtful decisions so that, if something ever happens, nobody has to figure my life out from scratch."**

### 1. Executor role

Would you be willing to help settle my estate after death? What would make the role manageable?

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### 2. Health-care decisions

Would you be willing to make medical decisions if I cannot? Would you want another family member or local person involved?

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### 3. Financial authority

Would you be willing to hold a POA role? Would you prefer a professional to handle routine bill-paying while you retain oversight?

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### 4. Local coordination

Who can physically check on me, enter my home, communicate with providers, and report accurately to distant family?

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### 5. Temporary vs. long-term incapacity

When should help begin? What decisions should wait if recovery is likely?

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### 6. Quality-of-life preferences

What does a meaningful recovery look like to me? When would comfort become more important than continued aggressive treatment?

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### 7. Housing and care

Where do I hope to live as I age? Under what conditions would a move become reasonable?

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### **8. Business / professional obligations**

If I own a business or practice, should it continue temporarily, be sold, or wind down? Who knows how it operates?

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### **9. Digital life**

Where are credentials stored? What should be preserved, memorialized, transferred, or deleted?

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### **10. What have I missed?**

What worries you? What role would you not want? What would make this easier for you?

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### **End with**

**"You do not have to accept a role you do not want. I would rather know that now and choose someone else than leave you with an obligation you never agreed to."**