

HELPFUL IDEAS FOR A FAMILY MEETING

In the Bible, when people were nearing the end of this life they often gathered their family members around them and communicated important information with them.

If you effectively use many of the forms and lists in this *LEGACY ORGANIZER*, you will be in a wonderful position to clearly communicate a great deal of valuable information and important instructions to your spouse and loved ones. The best way to normally do this is to schedule a special evening, weekend retreat, or even a family vacation to gather family together and share important information everyone needs to know and understand. Without some type of clear verbal and written communications, family members often find themselves confused, upset, and hurt about things that happen in the closing months and the months following the death of a parent.

NOTE: Sometimes a family meeting is called and organized by the aging parents for their adult children (and possibly spouses and older grandchildren). Other times it is the adult children that come to the realization that they need to schedule a time to meet with their aging parent(s) to go over a number of important items together. On occasion, some families even decide to utilize outside professional counsel or a trusted family friend to help plan and guide a family meeting.



Suggestions for the type of things that could be covered or included in one or more family meetings:

1. Take turns to express love and appreciation for each other.
2. Recall and share positive stories or life changing memories/moments with each other.
3. Reflect on the character qualities, personal attributes, and positive strengths of each other.
4. Ask or answer some key questions from the *LEGACY ORGANIZER* 100 questions (*see pages 1-4*).
5. Identify and ask for forgiveness for any specific wrongs that have been done in the past.
6. Have the parent(s) express their wishes for their children's and grandchildren's futures.
7. Talk about future housing plans/needs and timing (*i.e. transitioning from a house to an apartment/townhome/condo, retirement community, living with adult children or sibling, assisted living, etc.*) and transportation plans (when it will be necessary to stop driving, who can help drive to appointments, etc.).
8. Talk about who (*adult child? adult children? sibling? relative? paid worker? assisted living staff?*) will assist with caregiving needs that arise in the future.
9. Review and discuss in detail the financial picture -- current and future (*see pages 13-18*). Decide who will have power of attorney, access to financial accounts, and/or check writing authority.
10. Go over health insurance coverage and end of life medical wishes (*see page 21*).
11. Go over spiritual issues related to the future (*see page 22*).
12. Share with your family when and how you became a Christian, what Christ means to you, and your assurance that you know where you are going when you leave this earth. Express your desire for each of them to also come to have a personal faith in Christ.
13. Share and discuss funeral plans and wishes (*see pages 23-27*).
14. If applicable, family business issues and planning for the future.
15. Share key aspects of the estate plans: Christian/charitable giving decisions and wishes, how will the estate finances be handled and divided up, who is the executor or trustee (why?), specific instructions on how assets and possessions are to be handled and divided up, where are key documents located, and any other questions.
16. Determine if there is a specific family member that can assist in helping to fill out many of the helpful forms associated with the *LEGACY ORGANIZER*.
17. Pray together. Sing a favorite hymn together.

Some of these helpful ideas were provided by investment and family advisor, T. Randall Fairfax of www.highlandusa.net