

The Family Meeting Guide

Plan it, run it, and write down what you decided.

I know the words “family meeting” can trigger a kind of collective dread. But a well-structured family meeting, held before the crisis, with a clear agenda and a spirit of cooperation, is one of the most protective things you can do for your parent and for your family relationships. — *Becky*

SEVEN KEYS TO A GOOD MEETING

- 1 Choose the right format.** Not everyone needs to be in the same room. A video call with every sibling works, and it keeps the meeting from being postponed forever.
- 2 Set an agenda in advance.** Share it before the meeting so no one feels ambushed.
- 3 Start with your parent if possible.** Their wishes should shape the conversation, not be decided around them.
- 4 Designate a facilitator.** Whoever is best at staying calm, not necessarily the oldest or the closest.
- 5 Name the hard things directly.** They are far more uncomfortable to scramble through in the middle of a crisis.
- 6 End with specific commitments.** Vague agreements dissolve. Specific commitments hold.
- 7 Schedule the next conversation before you end this one.** Even a brief monthly check-in keeps everyone on the same page.

SUGGESTED AGENDA

- ☐ Current situation update
- ☐ Immediate concerns
- ☐ Future planning
- ☐ Division of responsibilities
- ☐ Financial considerations
- ☐ Next steps, with a timeline

HARD QUESTIONS TO NAME

- Who will make decisions if Mom or Dad can no longer decide?
- Who holds power of attorney, healthcare and financial?
- What are the financial realities?
- What does Mom or Dad want?

Anything to add to the agenda:

Record of Family Meeting

Send a copy to everyone within a day, so the commitments stay fresh.

Date:

Facilitator:

Who was in attendance

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Decisions made

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RESPONSIBILITIES ASSIGNED

Task · Who · By when

QUESTIONS STILL UNRESOLVED

Question · Who will follow up

Date of next family meeting: