



My Family Plans

Develop a
Financial
Dashboard

Protect
Assets

Prepare
Family
Meeting

Address
Uncovered
Long-Term
Care Costs

Minimize
Burden on
Others

Hold
Fair
Meeting

Minimize
Financial
Burden

Family: Planning Your Meeting

I have made the following decisions regarding my Family Meeting:

☐ When to hold my Family Meeting: (Date) _____

☐ What I should bring: (List items)

☐ Who should be invited: (List)

☐ Who should lead: (Name) _____

☐ What issues will be discussed: (List items)

Additional notes regarding planning my Family Meeting:

Family: During Your Meeting Checklist

During my family meeting, I did the following: (Select all that apply)

- ☐ Shared my plans
- ☐ Reviewed my resource team
- ☐ Listened & got input
- ☐ Made Commitments

Notes from my Family Meeting:

[illegible]

[illegible]