Estate Planning Family Meeting Agenda

A Practical Conversation Guide for Your Family

Prepared by	Date of meeting	People attending	Next review date

Purpose: This worksheet helps families discuss essential estate-planning information, responsibilities, and personal wishes. It is not a will, trust, power of attorney, or legal document. Review legal and tax matters with qualified professionals.

Before the Meeting

- ☐ Decide who should participate in this meeting.
- ☐ Choose a quiet time and private setting without time pressure.
- ☐ Identify the purpose: preparedness, clarity, and reduced stress—not a discussion of every private financial detail.
- ☐ Gather a current list of professional contacts.
- ☐ Confirm the location of original estate-planning documents.
- ☐ Consider whether sensitive inheritance or family-business decisions should be discussed separately.
- ☐ Set a follow-up date to review unanswered questions or changes.

Meeting Agenda

1. Begin With Your Purpose

Suggested opening: “We want you to know that a plan exists, where important information is kept, and whom to contact if something happens. Our goal is to make a difficult time easier for the family.”

Our family’s priorities and values:

2. Confirm Essential Documents

Document	Exists?	Date last reviewed	Where original is stored	Who should know the location?
Will	☐ Yes ☐ No			
Revocable or other trust	☐ Yes ☐ No			
Durable financial power of attorney	☐ Yes ☐ No			
Health-care power of attorney / proxy	☐ Yes ☐ No			
Advance health-care directive / living will	☐ Yes ☐ No			
Property deeds and titles	☐ Yes ☐ No			
Business documents, if applicable	☐ Yes ☐ No			

Safe-deposit-box information	☐ Yes ☐ No			

Attorney who prepared or maintains estate documents	Name	Firm	Phone	Email

3. Identify Key Roles

Role	Primary person named	Alternate / successor	Has this person agreed to serve?	Notes
Executor / personal representative			☐ Yes ☐ No	
Trustee			☐ Yes ☐ No	
Financial power of attorney			☐ Yes ☐ No	
Health-care agent			☐ Yes ☐ No	
Guardian for minor or dependent person, if applicable			☐ Yes ☐ No	

Executor Conversation Prompts

☐ Does the named executor know where to locate the original will and key records?

☐ Does the executor have the time, organization, and willingness to serve?

☐ Is an alternate executor named?

☐ Does the estate include real estate, a business, trusts, complex investments, or other matters that may require professional assistance?

☐ Does the executor know whom to contact for legal, tax, insurance, and financial-planning support?

4. Discuss Important Financial Information

Category	Is there an account, policy, or asset?	Where are records kept?	Contact or institution	Notes
Bank and cash accounts	☐ Yes ☐ No			
Brokerage and investment accounts	☐ Yes ☐ No			
Retirement accounts and pensions	☐ Yes ☐ No			
Life insurance or annuities	☐ Yes ☐ No			
Real estate	☐ Yes ☐ No			
Business interests	☐ Yes ☐ No			
Debts and recurring bills	☐ Yes ☐ No			
Digital assets and online accounts	☐ Yes ☐ No			

Beneficiary and Ownership Review

☐ Retirement-account beneficiary designations have been reviewed.

☐ Life-insurance and annuity beneficiary designations have been reviewed.

☐ Primary and contingent beneficiaries are named where appropriate.

☐ Account ownership and joint registrations have been reviewed.

☐ Beneficiary designations, account ownership, and estate documents appear coordinated.

☐ A professional will be consulted about questions or conflicts.

5. Discuss Health-Care and Long-Term-Care Wishes

Health-care agent or agents know where the relevant documents are kept	Status / notes
	☐ Yes ☐ No ☐ Needs follow-up

Topic	Wishes, instructions, or notes
Important health-care preferences or values	
Long-term-care planning information, if applicable	
Insurance carrier or policy location, if applicable	

6. Discuss Final Wishes and Personal Matters

Topic	Our wishes or instructions	Where details are stored
Funeral, memorial, burial, or cremation preferences		
Religious or cultural preferences		
Obituary or people to notify		
Charitable-giving wishes		
Family heirlooms or sentimental property		
Care of pets		
Home, vacation property, or business considerations		
Digital photos, social-media accounts, or online records		

7. Address Questions and Follow-Up Items

Question, decision, or concern	Person responsible	Professional help needed?	Target date
		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	
		☐ Yes ☐ No	

After the Meeting

☐ Share a written summary of practical information discussed.
☐ Confirm that the executor, trustee, and named agents know their roles.
☐ Update contact information and document locations.
☐ Schedule follow-up conversations for sensitive or unresolved topics.
☐ Review beneficiary designations and account ownership.
☐ Meet with an estate-planning attorney to update legal documents when needed.
☐ Coordinate financial accounts, insurance, retirement assets, and long-term goals with your financial planner.
☐ Revisit this agenda after a major life event or at least every few years.

Important Contacts

Professional or contact	Name	Organization	Phone	Email

Estate-planning attorney				
Financial planner				
Accountant / tax professional				
Insurance professional				
Executor / personal representative				
Trustee				
Health-care agent				

Educational disclosure: This guide is provided for educational purposes and is not legal, tax, or investment advice. Estate-planning documents and decisions should be reviewed with a qualified attorney familiar with the laws of your state.

Financial Life Planning can help coordinate the financial aspects of an estate plan, including investment accounts, retirement assets, insurance coverage, beneficiary designations, and long-term family goals. Learn more at flplanning.net.

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