SHARING YOUR ESTATE PLAN WITH YOUR LOVED ONES

A Guide for Your Family Meeting

A family meeting can protect your children and other heirs from the uncertainty and drama that far too many families navigate after a loved one passes away. It can help everyone get on the same page, opening the door to healthy dialogue about your values, goals and estate plan.

Key Considerations Before the Meeting

- Who among my loved ones should be involved?
- Would a trusted advisor, family friend or other mediator be helpful in guiding our conversation?
- Where is the best setting where all participants will feel welcome?
- Is there a date and time that will be most convenient for all involved? How much time should we allow for ample discussion, questions, processing and prayer?
- What else can be done to create a relaxed atmosphere that's free from distraction and generally puts my loved ones at ease?
- How much of the details of my plan am I willing to share? Do I want to reveal specific financial information and the exact amount each of my heirs and favorite charities will receive? Or would it be better to stick to generalities?

Tip: Create an outline for your discussion, and send it to your loved ones in advance. This may help reduce any unnecessary anxiety and allow your family members to come prepared with questions.

Flip to the back for a helpful worksheet with potential discussion topics.

Potential Topics for Discussion

What specific points do you want to communicate and discuss in your family meeting? Use this worksheet to help organize your thoughts in preparation for this important conversation.

1 What are some key moments from my personal walk with Christ? What experiences have shaped our family's story and faith journey?

2 What are the passions, core values or biblical principles that have guided my life? In what ways do I want my heirs to carry out this legacy?

3 What are some key financial principles that have shaped my approach to budgeting, saving, business ventures and investments?

4 How much or what percentage will each of my children, grandchildren or other loved ones receive? How much of my estate is designated toward charitable causes?

5 What motivates my charitable giving? In what ways do I hope my heirs will carry out this legacy of generosity?

6 Which organizations are included in my estate plan and why? How do my gifts to these organizations reflect my passions and values?

7 What are the practical matters of my estate plan that must be communicated? (e.g., executor, where my will and other documents are stored, timing and means of distribution, etc.)