

## ESTATE PLANNING CONVERSATION GUIDE FOR ADULTS & PARENTS

Here's a preamble of sorts and a long list of questions. You will want to put these in your own voice. Add and subtract as the conversation moves along.

"This is uncomfortable for me...You know I have your best interest at heart...Please hear me out because I would like to have a conversation about **something that is keeping me up at night.**"

"I've been thinking about the fact that someday you won't be here with me. I don't want to regret that we never had a chance to **talk about the hard stuff.**" (Insert something here if there is something or someone about whom you are both concerned.)

"Mostly, I want to help in whatever way I can so **that it goes as smoothly as it can go** when that time comes. I would really appreciate it if we could spend some time on this now. **I'll shut down my phone, so we don't get interrupted.**"

"Do you have time to do this now? **It might take a while.**"

"Is it ok with you if I **take notes**? This is important to me, so **I want to make sure I get it right.**"

1. I've been thinking about how much you have influenced my life, now that I am getting older and growing my own family, I'm making plans. I wondered what plans you have made like that. If something were to happen to you, **what would you want me to do?**
2. How do you **want to be remembered?**
3. What are the things or **times in your life** that you are most proud of?
4. Biggest **accomplishments?**
5. Favorite passages or sources of inspiration?
6. What **stories about you** do you want me to tell people?
7. Is there a **legacy** important to you or about our family?
8. Are there **any goals that relate to me** (and/or others, other children, grandchildren in our family) that you want me to know about?
9. Do you have a Power of Attorney? **Advance Directive?**
10. Do you have an idea about if / what kind of **service or memorial** you would want?
11. Are there **specific people** you want to have involved?
12. I'm specifically **wondering if you have plans for** \_\_\_\_\_ and \_\_\_\_\_ (things you think are important to them; or maybe things that are

important to you / remind you of them that you might want to care for after they are gone)

13. Who do **you want in charge** of specific things? (Maybe there's a list you make.)
14. If you own a business, what's the **succession plan**? Who else knows about it?
15. What do you think will be the **best for** \_\_\_\_\_? (maybe a family member has special needs or there is someone you would be concerned about after your parent is gone)
16. Do you **have a will**? If so, where is it kept?
17. Where do you keep the **other important documents** I might need if something happens?
18. What is the **biggest objective** of your will / trust / estate document/s?
19. Do you have a trust or other **estate plan**? If so, where can I find it when I need to?
20. **Who do you rely on** for updating these documents? How often do you update them? When was the last time?
21. Are you **comfortable sharing a copy with me** now?
22. If something happens to you, **what do you want me to know** about that I might not know now?
23. Is there anything specific you want to make sure happens when the time comes?
24. Do you have specific wishes for **your burial or handling**? Do you have plans already made?
25. Is there anything I can **do now** to make things easier then?
26. **How else can I help**?

“Thank you for sharing all this important information. I really appreciate knowing.  
**PS, I love you.** Thank you for everything you have done for me.”