The Family Information Session Planner

Companion worksheet to "Family Planning for the Future: Preparing Together for Life's Changes."

Set aside forty-five minutes. Do not try to finish every legal or financial task. Identify the four essentials below and note three questions that need a qualified professional. Assign one owner and one review date to each next step. This is not legal, medical, or financial advice; it is a way to organise the conversation so a professional can help you finish it.

EMERGENCY CONTACTS — PRIMARY AND BACKUP

Name, relationship, number

WHERE IMPORTANT DOCUMENTS LIVE + WHO CAN ACCESS

Location and authorised person — never passwords on this page

RESPONSIBILITIES NEEDING IMMEDIATE COVERAGE

Children, pets, medications, bills, caregiving, utilities

THREE QUESTIONS FOR A QUALIFIED PROFESSIONAL

Legal, medical, financial, or tax — with owner + date

The Family Information Session Planner (cont.)

WHEN WE WILL REVIEW THIS PLAN

Reflection

Five private questions from the article. Answer them for yourself before or after the family conversation.

1. Which important decision currently depends on one person's memory?

2. Who would need information first during a family emergency?

3. Which planning subject have we avoided because it feels uncomfortable?

4. Who should be included in decisions about aging, caregiving, or continuity?

5. What one document or conversation would reduce the most confusion right now?