



Family Care Planning Meeting Guide

This tool is designed to help family caregivers have calmer, clearer conversations when an aging parent faces a serious change such as illness, dementia, a fall, a financial crisis, or a growing need for care. By focusing on shared goals, realistic responsibilities, and respectful communication, families can reduce misunderstandings before they become conflict and create a plan that protects both their loved one and their relationships with one another.

Use this guide before or during a family meeting to keep the conversation focused, respectful, and centered on your loved one's needs.

Before You Begin

Review and agree that:

- Our purpose today is not to decide who's right.
- Our purpose is to create the best possible plan for someone we all love.

Ground Rules

- ☐ We will assume everyone has good intentions.
- ☐ We will focus on today's issues, not old family disagreements.
- ☐ We will listen to understand before responding.
- ☐ We will respect each person's limitations.
- ☐ We will keep Mom's (Dad's) wishes at the center of every decision.
- ☐ If we become stuck, we'll seek outside help before relationships suffer.

What Does Mom (or Dad) Want? Questions for Discussion

- What matters most to them?
- What are they worried about?
- What do they hope life looks like six months from now?

Our Shared Goal

What are we trying to accomplish together?

Everyone's Strengths (Rate 1-5, one being low, 5 being high); Be objective. Add rows as necessary. (*Ex: A sibling who is retired and lives nearby may be able to assist with getting Mom/Dad to medical appointments, but may not be as able to offer financial support*)

Family Member	Time	Transportation	Finances	Organization	Emotional Support	Other

Action Plan - Decide:

- Who will do what? By when?
- How will we communicate?
- When will we meet again?