

THE FAMILY · FREE COMPANION TOOL

The family meeting that actually goes somewhere

Most family conversations about a parent's care turn into old arguments in new clothes. This template keeps the meeting about your parent, not about the last thirty years. One goal, a clear agenda, a few ground rules, and everyone leaves knowing exactly what they own. Use it on a call or around a table.

Before you gather everyone

Set one goal for the meeting. Not "solve Mom or Dad." Something like: *decide who handles what for the next three months*. A meeting with one job succeeds; a meeting about everything fails.

Invite the people who affect the outcome — including the far-away sibling. Say plainly: "This is about sharing the load, not assigning blame."

□ The agenda — keep it in this order

- 1 **Where your parent is right now.** The point person shares what's actually happening — medically, day to day — so everyone starts from the same facts, not their last visit's memory.
- 2 **What they need this season.** Name the real tasks: appointments, meds, meals, money, safety, company. Write them where everyone can see.
- 3 **Who can do what — honestly.** Match tasks to people by ability and distance, not by guilt or birth order.
- 4 **The money conversation.** What their care costs, what they have, and how the gap gets covered. Say the numbers out loud once.
- 5 **One decision and one next step.** End with something concrete assigned to a named person by a named date. Otherwise nothing happened.

Where Quality of Life Counts

Educational information from Senior Advocators Inc. It is not medical, legal, or financial advice, and it does not create a client relationship. For your family's specific situation, speak with the appropriate licensed professional.

□ Dividing the load — give every role a name

The point person

Owens the calendar and the doctors. One person, or it falls through the cracks.

The hands-on person

Day-to-day care and presence. Usually carrying the most — protect them.

The money person

Tracks bills, benefits, and the budget. Often the one with the POA.

The far-away sibling

Real jobs exist from a distance: research, phone calls, paying for help, giving the local one a weekend off.

□ Ground rules to read out loud

- ☐ One person talks at a time. We're deciding, not relitigating.
- ☐ "I can't" is allowed. Better an honest no than a promise that fails your parent.
- ☐ The person doing the most gets the most say — and the most support.

Scripts for the hard moments

When you're drowning: *"I love them and I can't do this alone. I'm not asking if you'll help — I'm asking which part you'll take."*

When someone critiques from the sidelines: *"You may be right. Come do it for a week and show me — I would genuinely welcome the break."*

When a sibling won't engage at all: *"I'm going to make the decisions I have to make for Mom or Dad's safety. I'd rather make them with you. The door stays open."*

When the meeting is the hard part

Some family standoffs don't yield to a template — the history is too deep, or the stakes too high. **A consultation with Ginell Butler, MAASM, MSA** can help you prepare for the conversation, or bring a calm, credentialed outside voice to the table. senioradvocators.org

Where Quality of Life Counts

Educational information from Senior Advocators Inc. It is not medical, legal, or financial advice, and it does not create a client relationship. For your family's specific situation, speak with the appropriate licensed professional.