

Get a Life Plan

Frequently Asked Questions

How should I start a conversation with my loved ones about my plan?

Once you've decided to make a Life Plan, you might be wondering about how to start a conversation with your loved ones about your plan. Printing out any of the information from this webpage and sharing it with your loved ones can be a good way to get started. You can let your loved ones know that you are thinking about these important topics and you would like to visit an estate planning attorney to create your documents.

Here is a list of ideas for things you may want to include in your conversation:

Planning for your assets during your lifetime – Conversation topics

Let your loved ones know that you want to be prepared for unexpected illness or injury by choosing someone you trust to help you manage your finances if you ever become incapacitated. Once you've chosen the person you want to appoint to help you manage your finances, it's a good idea to notify that person that you have chosen them for this important role. First, you want to make sure they are prepared for the responsibility. Helping someone manage their finances is an important job. You also want to be sure they know where your planning documents are stored. If the time comes when you need help managing your assets, having this conversation in advance will ensure that the people you've chosen are ready to step in.

Planning for medical decisions – Conversation topics

Being prepared for unexpected illness or injury also means thinking about choosing someone you trust to help with your medical decisions if you ever lose the ability to handle them yourself. When it comes to appointing someone else to help with your medical decisions, it's important to have a conversation about your health care wishes and core values. End-of-life medical decisions can be emotional, but talking about them in advance can help. For example, if you have strong feelings about life support and tube feeding, you should complete an Advance Directive for Health Care and share your feelings with the people you've appointed to communicate your wishes to your doctors. The best way to make sure that your health care wishes are carried out is to make sure the people you've chosen to speak to your doctors really understand and respect what your wishes are.

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Planning for your assets at death – Conversation topics

1. Talking about how your assets will be distributed

When planning for your assets at death, a little bit more privacy can be a good thing. If you create a Will or a Revocable Living Trust to distribute your assets at death, you don't necessarily need to tell your loved ones about the details of your distribution plan unless you think there may be some surprises in your plan and you want to discuss those details with your loved ones to help them understand. You are free to make changes to your Will or your Trust throughout your lifetime, so keep in mind that your plans today might change in the future. Knowing about a possible inheritance can sometimes have negative consequences for your loved ones. It may be better for them to learn about their inheritance after you have passed away.

2. Talking about who will be in charge of your Will or your Trust

You will name a trustworthy person in your documents to be in charge of your assets after you die. It's a good idea to tell that person that you have created a Will or a Trust and to make sure that person can locate your documents after your death. If you think there might be some surprise or confusion about the person you've chosen to be in charge, you can also have a conversation with your loved ones about your choice to help them understand.

Planning for your body at death – Conversation topics

Talking about topics like burial, cremation, or organ donation with loved ones can be emotional. Your loved ones may not want to think about losing you. However, by making a plan for them to follow and letting them know that you've made a plan, you can help ease the burden on your loved ones after you pass away. If your loved ones are open to talking about the details of your plan, you can share your specific wishes. If your loved ones aren't open to that conversation, you can at least tell them where your important documents are stored and let them know you have specific wishes regarding your body at death. Also, if you pre-arrange or pre-pay for any arrangements, you should share this information with your loved ones. Importantly, if you have any concern about your loved ones being unwilling to carry out your wishes, you should consider completing a Disposition of Remains form to appoint someone you trust to carry out your wishes.