

Topics to Cover with Your Loved Ones

Openly discussing your estate plan with your loved ones can help alleviate hurt feelings, allow loved ones to discuss your choices with you, and reduce the likelihood of a will or trust being contested when you pass away.

The amount of information you share about your estate plan is up to you. Below is a list of topics you can discuss with your loved ones. You can choose how in-depth you want to go. We will happily meet with you and your loved ones if you need assistance facilitating this conversation.

BASIC

- ☐ Explain that estate planning documents have been prepared
- ☐ Let your loved ones know where the estate planning documents are located. You may also provide the contact information of the attorney who drafted your estate plan so your loved ones can get the documents from the attorney if they cannot locate your plan (assuming you have signed the required confidential waivers with the attorney).

INTERMEDIATE (IN ADDITION TO BASIC)

- ☐ Divulge who you have chosen to serve in the major decision-making roles (personal representative, trustee, agent under a financial power of attorney, and patient advocate under a medical power of attorney). This may involve explaining why you chose certain individuals over others.
- ☐ Cover the types of documents included in your estate plan. Do you have only a will, or do you also have a trust? Are there multiple trusts? Do you have any life insurance policies or retirement accounts that name selected beneficiaries?
- ☐ Have a general discussion about how things will be divided. Let those receiving something know (you do not need to tell them how much they will receive unless you want to) and disclose whether the accounts and property you own will be divided equally among those involved or if other arrangements have been made.

FULL (IN ADDITION TO BASIC AND INTERMEDIATE)

- ☐ Collect all your estate planning documents and review them with your family. Explain who has been chosen for each role and what will be required of them, if and when they need to act. Let your chosen decision-makers know where they can find the necessary documents and, if desired, give them copies for easy access
- ☐ Discuss exactly what each person will receive upon your death and when.



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