



Voya Cares Checklist

Family meeting: discussion topics

Keeping family members informed of care plans and working together on future planning can ensure that quality of life is maintained for your loved one. Family meetings may help this process, and advanced preparation ensures a smooth meeting. This checklist may get the process of preparing an agenda started.

- ☐ State the purpose of the meeting.
- ☐ Describe your loved one's capabilities and needs.
- ☐ Recognize caregiving concerns and discuss sharing responsibilities:
 - Who has flexibility to help?
 - Who is geographically closest?
 - How do we split up duties?
 - Identify emergency contact
- ☐ Identify projected expenses and lifestyle needs:
 - Medical expenses
 - Personal assistance
 - Assistive devices
 - Transportation
 - Housing
- ☐ List income sources now and in the future
 - Earned income/pension
 - Inheritances
 - Government benefits
 - Special needs trust
 - ABLE account
- ☐ Determine who has decision-making responsibilities (e.g., financial, medical, hiring a caregiver, etc.).
- ☐ Decide on successor guardians, if applicable. Successor guardians should be multi-generational.
- ☐ Identify legal instruments that are or will be in place, such as wills, advance directives, powers of attorney, and trusts.
- ☐ Choose trustees, if a trust is or will be put into place. Trustees and their successors should be multi-generational. A corporate trustee can be a co-trustee to assist with financial decisions and tax preparation.
- ☐ Summarize decisions made and schedule the next meeting. After the meeting, provide a written summary of what each person has agreed to, as well as an email or telephone tree for regular updates.

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