



Resource: 15-Minute Family Conversation Starter

You don't need a big meeting. A short, calm conversation is enough.

Before you start (2 minutes)

Pick a time when nobody is rushed. You can say:

“I'm doing some planning so things are easier later. I only need 15 minutes.”

What to cover (10 minutes)

1) Who's who (2 minutes)

- Executor/personal representative: _____
- Backup: _____
- Enduring Power of Attorney: _____
- Personal Directive agent: _____

2) Where things are (3 minutes)

- Documents are located here: _____
- Passwords / digital info are located here: _____
- If something happens, the first call should be: _____

3) What matters most (5 minutes)

Choose a few simple prompts (no details needed):

- “If I'm seriously ill, what matters most to me is...”



- “If I die, I want my family to remember...”
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- “I’d like my funeral or memorial to be...” (simple / small / faith-based / celebration / other)
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- “The most important thing is that you don’t have to guess.”

How to end (3 minutes)

“Thanks. I’ll write this down and share where it’s stored.”

Pick one follow-up action:

- Share document location in writing
- Fill out My Planning Snapshot or Ducks in a Row booklet
- Record funeral preferences (CMS profile / Funeral Preferences Worksheet)
- Schedule a longer talk later

