

Legacy Conversations

24 Discussion Questions for Aging Parents

1. Will you need financial help in retirement?
2. Do you have any debt? When & how will it be paid off?
3. If faced with this, would you want to live with a family member or in a care facility?
4. Do you have will? Lawyer you used?
5. Who is the executor/executrix of your estate? Back-up executor?
6. Do you have a "Where is Everything" document? Where is it located?
7. Do you want to be cremated or buried (PLOT or POT)? Where?
8. How do I want my funeral/memorial service to look? Do I observe any religious rites of passage?
9. Have you already made any funeral arrangements? Purchased plots? Chosen funeral home? Remains kept?
10. To whom do you want your monetary/fixed assets to go?
11. To whom do you want your personal items to go? Make a list of any valuables, collections, furniture, etc., which are not in your will and specify whom they will go to. (This note can be kept with the will.)
12. Do you have a safety deposit box? Where? Where is the key of the box located?
13. Are you an organ donor? Have you signed your health care card?
14. When and where would you consider moving? Do you want to downsize at some point?
15. Where are your tax files kept? Who files your taxes?
16. Are you aware of the tax consequences of your estate? How do you want the tax paid on your final tax return?
17. Where is your financial paperwork kept?
18. Do you own any joint accounts or joint property?
19. What insurance policies are in place? When do they expire?
20. Are your beneficiaries up to date on all of your accounts and insurance?
21. Do you have a Power of Attorney and Personal Health Directive? What are your wishes?
22. Is there anything in the will that could cause discord in the family? Is everything split evenly? Discussion for blended families.
23. Is there a church/charity/cause you want to support?
24. When should we talk about this again to review?

